U.S. Department of Transportation

United States Coast Guard

Commanding Officer
U. S. Coast Guard
Human Resources Service &
Information Center

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HRSICNOTE 1000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-2 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **PURPOSE.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **ACTION.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **SUMMARY.** The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

a. Changing of Basic Allowance for Quarters (BAQ) to Basic Allowance for Housing (BAH): Changes have been made throughout the manual to show BAH vice BAQ.

b. PCS Departing Checklist page 2-A-3: Updated references on the PCS Departing Checklist.

c. PCS Reporting Checklist Page 2-A-5: Changed FSA Type 1 to FSH (Family Separation - Housing). Changed BAQ/VHA allowances to BAH allowances. Changed BAQ/VHA Housing Worksheet to BAH/Housing Worksheet.

d. Overseas Transfer Checklist Page 2-A-6: Added a step to the Overseas Transfer Checklist that requires the PERSRU supervisor to verify and sign the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.

e. Automatic Stops of Pay and Allowances Pages 2-A-7 and 2-A-8: Added the new entitlement Partial BAS as an autostop on the day prior to the effective date of departure. Changed Partial BAQ to BAH Partial.

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NON-STANDARD DISTRIBUTION: See page 8

f. How to prepare NATO Order Pages 2-A-9 and 2-A-10: Removed the procedures on how to prepare a CENTO Order. These types of orders are no longer used.

g. Preparation of TAD Order (CG-4251) Block 12 Page 2-B-13: Added a requirement for the remarks block of the TAD Order. The maximum per diem rate (lodging and M&IE) for where the member will be TAD must be included in the remarks block of the TAD orders (if the member is going to draw per diem).

h. Accessions Pages 3-A-1 through 3-A-5: Updated the procedures for accessions and added procedures for recalling RET-2 members.

i. Immediate and Priority Separation Processing Pages 3-B-5 through 3-B-8: Updated the procedures for immediate separations and priority separations.

j. Expedited Separation E-Mail Message Exhibit 3-B-1, Page 3-B-9: Changes have been made to Exhibit 3-B-1 to ensure that more detailed information is being sent on priority separation messages.

k. Requesting a Document Number and Accounting Data for Separation Orders Exhibit 3-B-2 Page 3-B-12: Changes have been made to Exhibit 3-B-2 to have PERSRUs submit cancellation of document numbers and accounting data messages to COMDT (G-WR-1) vice COMDT (G-WR-3). Also changed E-mail messages to E-mail (so there is no confusion as to if an e-mail should be sent or a message).

l. Checklist for Reenlistment or Extension Page 3-C-3: Added information that reserve members may reenlist up to 60 days prior to normal expiration of enlistment. Also updated the references on this checklist.

m. Immediate Enlistment in the Coast Guard Reserve Upon Discharge from the Regular Coast Guard Page 3-C-9: Updated the reference block on this page.

n. Education and Qualifications Page 4-C-12: When a member becomes qualified to wear the Company Commander Insignia, this qualification must be reported to the PERSRU for entry in PMIS/JUMPS. Procedures on how to report this to the PERSRU has been added to this section.

o. BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) Pages 5-A-2 through 5-A-5: Changed the form name from BAQ/Dependency/Emergency Data and Validation (CG-4170A) to BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A). Changed Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance.

p. Distribution of the CG-4170A Page 5-A-6**:** The distribution for the CG-4170A has been changed. Originals are now sent to CGPC (adm-3) vice the PERSRU.

q. Servicemembers' Group life Insurance Pages 5-A-7 to 5-A-13: This section has been changed from Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance. This section also has been changed significantly to show more detailed information about designation of SGLI.

Continued on next page

r. Annual Verification of CG-4170A Page 5-C-2: Updated procedures on the annual verification of CG-4170A.

s. Requesting Statements of Creditable Service Pages 5-C-3 and 5-C-4: This section has been changed significantly to show more detailed information on the procedures for requesting a statement of Creditable Service/Sea Service.

t. Personnel Data Information File Page 5-C-5: Added a note that if the units are not receiving PDIFs for their members, then they should contact their servicing PERSRU. The PERSRUs have the ability to send the PDIFs via e-mail (as an attachment) or by printing them off and sending them to the unit.

u. Transcript of Sea Service (TOSS) Page 5-C-8: Updated the procedures for requesting a TOSS.

v. Leave Authorization (CG-2519) Page 5-D-2: A Leave Authorization (CG-2519) is only required for sick leave in excess of 2 days.

w. Leave Carried over in Excess of 60 Days Pages 5-D-4 and 5-D-5: Added this section to show what needs to be done if a member or multiple members of a unit are authorized to carry more than 60 days leave into a new fiscal year.

x. Correction/Changes of a Names, SSN, Date of Birth, or Minority Designator Pages 5-D-17 and 5-D-18: Request for corrections or changes to names, SSN, date of birth, or minority designator are now forwarded to HRSIC (MAS).

y. TRICARE Selected Reserve Dental program Pages 5-D-19 and 5 -D-20: Added a section about the new TRICARE Selected Reserve Dental Program.

z. Special Payments Page 6-B-3: Added a note to this section that says a member will not be authorized a special payment by HRSIC for any type of bonuses (SRB, Enlistment Bonus, SELRES bonus).

aa. Significant Pay Shortage Procedures Pages 6-B-5 through 6-B-6: PERSRUs are required to send an E-mail using the format in Exhibit 6-B-1 to MAS/HRSIC when requesting a special payment in pay shortage cases.

bb. Advance payments Pages 6-B-7 and 6-B-8: Changed the type of advances of BAQ/VHA to BAH. Also changed the type of advances of OHA interim Housing Allowance and BAQ to OHA Interim Housing Allowance and BAH Type II.

cc. Offline Payments for Advance Payments Pages 6-B-8 and 6-B-9: PERSRUs are required to send an E-mail using the format in Exhibit 6-B-2 to MAS/HRSIC when requesting an offline payment for advance payments.

dd. Death Gratuity Payments Page 6-B-11: Updated the procedures on Death Gratuity payments.

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ee. Deployed Unit Money list Message (DUMLUM) Page 6-C-3: HRSIC (MAS) issues DUMLUM approximately 3 days before each payday while cutter is deployed vice 5 days.

ff. IDT Process, IDT Prerequisites, Drill Orders, Pages 6-D-2 through 6-D-4: Updated the reference block in these sections.

gg. Waiver of Pension/Disability Compensation or Retired Pay Page 6-D-12: Updated the reference block in this section.

hh. Annual Reserve Retirement Point Statement Pages 6-D-14 and 6-D-15: Added a section about the Annual Reserve Retirement Point Statement (CG-4175A).

ii. Basic Allowance for Subsistence (BAS) - Enlisted Page 7-B-2: Changed the old partial BAS to Pro-Rated BAS.

jj. Family Separation Allowance Pages 7-B-3 through 7-B-6: Updated procedures on how to report Family Separation Allowance.

kk. Overseas Housing Allowance (OHA) Page 7-B-7: Changed BAQ to BAH Type II and FSA-Type I to Family Separation - Housing (FSH).

ll. Information about the W-2 form and how to request a duplicate or corrected W-2 form Pages 8-B-11 through 8-B-15: This section has been changed significantly to provide more detailed information about the W-2 form.

mm. Request for Federal or State Tax Adjustments Pages 8-B-16 and 8-B-17: Added this new section to provide the procedures for members requesting a Federal or State Tax Adjustment.

nn. Collection of PMIS/JUMPS Overpayments Pages 9-A-2 and 9-A-3: A Notice of Overpayment (NOP) letter will be provided by HRSIC (MAS) for each member with a debt of $751.00 or more vice $500.00 or more. If a member has an overpayment of less than $150.00 then this pay will be taken during the current month if sufficient net pay exists. If member has an overpayment of $150.00 to $750.00 then this pay will be scheduled for automatic repayment at a rate not to exceed $150.00 a month starting the next month.

oo. Collection of Other Debts Page 9-A-4: The procedures for collection of other debts has been updated.

pp. Nonjudicial Punishment (NJP) Checklist Page 10-B-2: Reports of NJP are now reported to COMDT (W-KS-5).

qq. Courts-Martial Checklists Page 10-B-3: Reports of courts-martials are now reported to COMDT (W-KS-5).

rr. Reporting Civil Arrest or Conviction Pages 10-B-13 and 10-B-14: Procedures on how to report a civil arrest or conviction have been updated.

Continued on next page

ss. Forms and Worksheets Enclosure (1): All of the forms and worksheets in Enclosure (1) that had BAQ information on them, have been changed to show BAH vice BAQ. The following changes have also occurred:

- The BAQ/VHA Housing Worksheet has been renamed to BAH/Housing Worksheet and the VHA information has been removed.
- A block has been added to the PCS Departing Worksheet that requires the PERSRU supervisor to verify and sign if the member is going to PCS OUTCONUS.
- A block has been added to the PCS Reporting Worksheet that ask the member if he/she is entitled to, and meets the requirements of, FSH.
- A reminder for "Advancement Evaluations should be submitted on a member who is being advanced, when applicable" has been added to the Career Development Worksheet.
- The Family Separation Allowance Worksheet has been changed. FSA Type I has been removed and the worksheet has been updated with the new terminology for FSA (i.e., FSA Type II has been changed to FSA-R, FSA-S, and FSA-T).
- A block has been added to the TAD Travel Request/Authorization Worksheet that allows a funds approving official to sign and date the worksheet, when applicable. Also, another block has been added to the worksheet that allows the unit to enter what the total cost of per diem is going to be.

tt. PDIF Enclosure (5): A better description of all the blocks on the PDIF have been added to this section. Also a description of all the codes that may be used on the PDIF have been added to this section.

uu. Award Codes Enclosure (10): Award code 'CC' has been added to this enclosure. It is the new Company Commander Insignia.

vv. Retirement Package Appendix A: The Reserve Component Retirement Pay Account Worksheet (CG HRSIC-4700/R) has been added to this section.

ww. Instructions for the DD-1172 Appendix B Page B-1: Updated information on the eligibility of Wards has been added to this section.

xx. Computation of Service Appendix C Pages C-25 to C-33: Added examples on how to compute date of rank on members entering the service and were prior service.

yy. PDR System Appendix D: Military Personnel Data Records (PDR) System, COMDTINST M1080.10C is cancelled and has been replaced by Military Personnel Data Records (PDR) system, COMDTINST M1080.10D.

zz. Traveler's Guide Appendix E: The Traveler's Guide has been updated with current travel claim procedures and HRSICINST 4600.1 (procedures for faxing travel claims) has been added to this section.

aaa. You and Your LES Appendix F Pages F-4 and F-6: BAQ entitlement have been changed to BAH entitlements on block 25 of the LES. The new Partial BAS has been added as a common entitlement to the LES.

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4. PROCEDURE. Remove and insert the following pages:

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Enclosure 1 CG-5489A	Enclosure 1 CG-5489A
Enclosure 1 CG-5489B	Enclosure 1 CG-5489B
Enclosure 1 CG HRSIC-2000	Enclosure 1 CG HRSIC-2000
Enclosure 1 CG HRSIC-2005	Enclosure 1 CG HRSIC-2005
Enclosure 1 CG HRSIC-2010	Enclosure 1 CG HRSIC-2010
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Enclosure 1 CG HRSIC-2020A	Enclosure 1 CG HRSIC-2020A
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Enclosure 1 CG HRSIC-2030	Enclosure 1 CG HRSIC-2030
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Appendix D (PDR Instruction)	Appendix D (PDR Instruction)
Appendix E (Travel Guide)	Appendix E (Travel Guide and HRSICINST 4600.1)
Appendix F Pages F-3 to F-6	Appendix F Pages F-3 to F-6
Index Pages I-1 to I-6	Index Pages I-1 to I-6

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

R. J. WILLIAMSON

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Enclosures and Appendices

Directives Referenced in this Manual, Continued

Directives referenced
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Number	Long Title	Abbreviation
COMDTINST M10470.10(series)	Coast Guard Rescue and Survival Systems Manual	CG Rescue Manual
COMDTINST M11101.13(series)	Coast Guard Housing Manual	Housing Manual
HRSICINST M1000.2 (series)	Personnel and Pay Procedures Manual	PPPM
FINCENINST M7000.1	Coast Guard Finance Center Standard Operating Procedures	FINCEN SOP
JFTR Vol 1	Joint Federal Travel Regulations	JFTR

Forms Referenced in this Manual

Introduction

Several forms are referenced throughout the Personnel and Pay Procedures Manual. The forms listed below and the forms and worksheets contained in Enclosure (1) to this manual, are needed to complete the action described.

Forms referenced

Forms referenced in this manual and corresponding form numbers.

Form Number	Form name
AF Form 538	Personal Clothing and Equipment Record
CG-2519	Leave Authorization
CG-2556	Move-In Housing Allowance Claim Form
CG-2842	Notification of Removal of Absentee Wanted Notice
CG-3029A	Individual’s Record of Small Arms Training
CG-3301B	Agreement to Extend/Re-extend Enlistment
CG-3307	Administrative Remarks
CG-3453	Request for ADT Orders
CG-3698A	Assignment Data Form
CG-3853	Personal Effects Inventory and Disposition
CG-4057	Chronological Record
CG-4170A	BAH/Dependency/Emergency Data and SGLI Validation
CG-4178	Good Conduct Certificate
CG-4251	Military Temporary Additional Duty (TAD) or Civilian Temporary Duty (TD) Request and Travel Order
CG-4902	Personnel Data Extract
CG-4910	Report of Offense and Disposition
CG-5131	Standard Travel order for Military Personnel
CG-5209	Leave and Earnings Statement

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Section Overview

Introduction

This section will guide you through the Permanent Change of Station (PCS) process.

In this section

The PCS Transfer Process

Introduction

The transfer process depends on communication between many participants. This process is broken down into stages identifying what needs to be completed and who is responsible.

Process

This is the process.

Stage	Who does it	What Happens
1	Member	Prepares CG-3698A
2	Issuing Authority	Issues transfer order (e.g. CGPC ETO)
3*	PERSRU	Notifies unit when order is received
4*	Member/Unit	• Completes PCS Departing Worksheet (CG HRSIC-2000) and forwards to PERSRU • Schedules appointment with servicing Transportation Officer (TOPS site) to arrange shipment of HHG
5*	PERSRU	Prepares SDA II PCS Departing Transactions (CG-5131)
6*	PAO/HRSIC (TVL)	If requested, will process travel advances (preferably by facsimile)
7*	TO (TOPS site)	Counsels member and arranges shipment of HHG
8*	Unit	Endorses order upon departure
9*	PERSRU	Completes SDA II PCS Departing Transactions
10	Member	Reports to new unit, prepares • Travel claim DD-1351-2 (for self and dependents) • PCS Reporting Worksheet (CG HRSIC-2005) • BAH/Housing Worksheet (CG HRSIC-2025)
11	New Unit	• Endorses order with date and time reported and messing status (e.g. BAS, SEPRATS, RIK) • reviews travel claim(s), and forwards to HRSIC (TVL) with original order • forwards worksheets to PERSRU with a copy of the endorsed order
12	PERSRU	Completes SDA II PCS Reporting Transactions
13	HRSIC (TVL)	Processes travel claim(s)
14	Member	Prepares CG-3698A

*The PERSRU and unit are to build a relationship that ensures these procedures are completed using the most expeditious means possible.

PCS Departing Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/PERSRU in completing all necessary tasks required for departing PCS. This job aid is designed to be reproduced locally.

Departing Checklist

Action upon receipt of a PCS Order.

Step	Action	Reference	Date
1	Ensure member is eligible for transfer	4-B-1 PERSMAN	
2	Ensure member meets obligated service requirements for transfer	4-C-6 PERSMAN	
3	Ensure member meets requirements for overseas transfer (if applicable)	2-A-6 PPPM	
4	Complete NAVPERS 1330/2 Navy Sponsor Notification	4-A-15 PERSMAN	
5	Counsel member on PCS travel entitlements	Chapter 5 CGS-JFTR	
6	Verify member's entitlement to FSH and/or FSA-R	3-F PAYMAN	
7	Complete PCS Departing Worksheet (CG HRSIC-2000)	Encl. (1) PPPM	
8	Complete performance evaluation **Mandatory** - if on the date of detachment 92 or more days have elapsed since the last performance evaluation was completed **Optional** - if on the date of detachment less than 92 days have elapsed since the last performance evaluation was completed	10-B-5 PERSMAN	

Continued on next page

PCS Departing Checklist, Continued

Departing Checklist (continued)

Step	Action	Reference	Date
9	Review PDR	PDR Instruction	
10	Ensure member has a valid ID card	5-D-4 PPPM	
11	Verify that member's dependents are enrolled in DEERS	5-B-17 PPPM	
12	Ensure member meets weight standards	Weight Instruction	
13	Prepare SDA II PCS Departing Transactions (PERSRU)	None	
14	Complete SF-1038 for travel advances, if requested	2300 CGS-JFTR	
15	If requested, fax original order and SF-1038 to HRSIC (TVL) for travel advances	2300 CGS-JFTR	
16	Ensure member has an appointment scheduled with transportation office (TOPS site) to arrange shipment of HHG	None	
17	Transfer Government Travel Charge Card account to coordinator at the new PDS	Charge Card Instruction	
18	Return order to unit/member (PERSRU)	PPPM	
19	Ensure security debriefing is conducted	PERSEC	
20	Distribute order	PPPM	
21	Forward PERSRU PDR, Unit PDR and MED PDR	PDRMAN	

PCS Reporting Checklist

Introduction

This checklist has been provided as a job aid to assist the unit and PERSRU in completing all necessary tasks for reporting in from PCS. This job aid is designed to be reproduced locally.

Reporting checklist

Action upon member reporting

Step	Action	Reference	Date
1	Endorse order	2-A-2 PPPM	
2	Verify member's entitlement to FSH and/or FSA-R, and BAH allowances	3-F PAYMAN	
3	Complete PCS Reporting and BAH/Housing Worksheets and forward to PERSRU with copy of endorsed order • Ensure member supplies mailing address so PERSRU can update block 22 of LES	Enclosure (1) PPPM	
4	If applicable, ensure member completes Allotment and Bond Worksheets so addresses for allotments and bonds can be updated	Enclosure (1) PPPM	
5	Ensure member completes travel claim for self and dependents, if applicable	Appendix (E) PPPM	
6	Ensure supervisor reviews travel claim and initials block 16 within 2 working days	Appendix (E) PPPM	
7	Ensure the travel claim and original order are forwarded to HRSIC (TVL) for processing	Appendix (E) PPPM	
8	Update Personnel Security Record (CG-5274) and conduct arrival briefing	PERSEC	
9	Ensure member submits a new Assignment Data form (CG-3698A) within 6 months	5-D-11 PPPM	
10	If applicable, ensure Government Travel Charge Card account was transferred from old PDS	Charge Card Instruction	
11	Ensure member has a valid ID card	5-D-4 PPPM	
12	Ensure a performance evaluation was completed by the previous unit within 92 days of detachment	10-B-5 PERSMAN	
13	Complete a new CG-4170A	5-A-2 PPPM	
14	Review PDR	PDR Instruction	

Overseas Transfer Checklist

Introduction

This checklist has been provided as a job aid to be used when a member receives an order for overseas. It is designed to be reproduced locally and should be used along with the PCS Departing Checklist

Step	Action	Reference	Date
1	Ensure that message concerning overseas transfer with list of screening questions is received from the overseas command to which the member is ordered.	4-H-4 PERSMAN	
2	Interview member and/or dependents for suitability within 10 days of receipt of transfer order. Use the **"Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN** and the list of screening questions sent by the overseas command to complete the interview.	4-H-2 PERSMAN	
3	Ensure the servicing PERSRU supervisor has verified for completeness and signed the **"Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.**	Upcoming Change to PERSMAN	
4	Ensure the member <u>and dependents</u> are medically qualified for overseas transfer. The member must have an approved overseas physical including immunizations and any essential dental treatment completed within the last 6 months.	4-H-3 PERSMAN3 -A-7 MEDMAN	
5	Ensure member and dependents • have valid ID cards • have International Certificates of Vaccination PHS-731 (if required) • are provided with detailed information concerning tour length and have elected an appropriate tour • are counseled regarding overseas station allowances when member is assigned to a restricted area and dependents reside in an area outside the U.S.	4-H-7 PERSMAN	
5	Ensure that the member has made arrangements for passports if required.	Passports Instruction	
6	Ensure member, if in pay grade E-2 thru E-6, has a valid drivers license.	4-H-7.d PERSMAN	
7	Send request for entry approval message to overseas command. **Note:** Need to ensure that the overseas command has received a copy of the Command Checklist for Overseas Screening prior to requesting approval.	4-H-9.a PERSMAN	

Automatic Stops of Pay and Allowances

Introduction

Certain pay entitlements are automatically stopped when the departing or reporting endorsement on orders transaction processes.

References

- CG Pay Manual
  Chapter 3, Allowances
  Chapter 4, Special Pay
  Chapter 5, Incentive Pay

- JFTR, para. U9100, Housing and Cost -of-Living Allowances

Auto Stops on PCS

This table shows which pay entitlements will be automatically stopped when PCS transfer occurs.

Note: Automatic stops will not occur on interoffice transfers.

Entitlement Description	When the Entitlement Stops
Basic Allowance for Housing - Child (BAH Diff) (Codes P, Q, or R only)	On the day prior to reporting
Basic Allowance for Housing (BAH)- Without Dependents	On the day prior to the effective date of departure (E-4 with less than 4 years of service and below only)
Basic Allowance for Housing - Partial (BAH Partial)	On the day prior to the effective date of departure
Basic Allowance for Subsistence (BAS/SEPRATS, enlisted only)	At 0459 hours on the effective date of departure
Basic Allowance for Subsistence (Partial BAS, enlisted only)	On the day prior to the effective date of departure
SEPRATS-T	At 1859 on the effective date of reporting PCS
Career sea pay/time and premium	On the effective date of departure
Combat Tax Exclusion	On the last day of the month of the effective date of departure
CONUS Cost of Living Allowance (CCOLA)	On the day prior to the effective date of reporting

Continued on next page

Automatic Stops of Pay and Allowances , Continued

Auto Stops on PCS (continued)

Entitlement Description	When the Entitlement Stops
Cost of Living Allowance (COLA), with or without dependents and partial	On the day prior to the effective date of departure
Crew flight pay (enlisted only)	On the effective date of departure
Diving Pay	On the effective date of departure
Family Separation - Housing (FSH) and Family Separation Allowance (FSA-S only)	On the day prior to the effective date of departure
Family Separation Allowance (FSA-R and FSA-T only)	On the day prior to reporting, less any leave, proceed time or compensatory absence
Foreign duty pay	On the effective date of departure
Hostile Fire, Imminent Danger Pay	On the last day of the month of the effective date of departure
Noncrew flight pay	On the effective date of departure
Overseas Housing Allowance (OHA), with and without dependents	On the day prior to the effective date of departure
Responsibility Pay	On the effective date of departure
Special Duty Assignment Pay (SDAP)	2400 on the day before the member departs PCS
Special subsistence (SPEC BAS)	On the day prior to the effective date of departure

How to Prepare NATO Order

Introduction

A NATO order, along with proper identification, allows an individual to pass without difficulty from one NATO nation to another. This order is only for the movement of military personnel, their personal baggage, individual weapons, and official documents.

References

CG Personnel Manual, Article 4-A-18, NATO Supplemental Order

Format for order

The below table describes how to complete a NATO order.

Step	Action
1	Top of letterhead type: Grading of Form: NATO UNCLASSIFIED
2	Include in the heading: country of origin, SSN, date order prepared.
3	In the first paragraph include: • Name, rank, grade and ID card number • Destination, within NATO country. • Date of departure from original country. • Number of days member will remain in NATO country, if PCS, so indicate.
4	In the second paragraph include: Authorization for member to possess and carry firearms.
5	In the third paragraph include: The number of official dispatches and that they are official documents.
6	In the fourth paragraph include: A certification that the travel is under the provisions of the NATO Status of Forces Agreement.

Note: Officer authorizing the NATO travel will sign the order.

Continued on next page

How to Prepare NATO Order , Continued

Recommended format

Here is the recommended format for NATO travel orders

Note: **NATO** travel orders will be prepared in English and French. Any instructions printed on the reverse of the orders will appear in English only.

Grading of form: **NATO UNCLASSIFIED**

NATO TRAVEL ORDER **ORDRE DE MISSION OTAN**

Country of Origin:
Pays de provenance:

Social Security Number
Date order issued

1. Ther bearer (and group as shown heron or on attached list)
Le porteur (et personnel porte ci-dessus ou sur la list jointe)

Personal/Identity Card No. (if any) Name: Rank/Grade
*No Mle/de la cazrte d'identite*_______________________________*Nom:*___________________
(s'il y a lieuy)

will travel to:
fera mouvement a: ____

Date of departure
*Date du depart, le (ou vers le):*________________________

___For a period of approximately ___________days ______For Permanent change of station,
*Pour a peu pres*_______________*jors*________ *Pour changement permanent de garnison.*

2. Authority (is)(is not) granted to possess and carry arms.
Autorisation dep port d'armes (accordee) (non accordee).

3. The person named in paragraph 1 is authorized to carry _____ sealed dispatches.
La personne indequee au paragraphe 1 est authorisee a porter _____ plis scelles.

a. These dispatches contain only official documents.
Ces plis ne contiennent que des documents officiels.

4. I hereby certify that this individual/group is/are member(s) of a Force as defined in the NATO Status of Forces Agreement, and that this is an authorized mover under the terms of this agreement.

Je soussigne certifie que le personnel vise appartient a une armee telle definie dans I'Accord OTAN sur le statu des Forces Armees et que ce deplacement est officiel selon les termes de cet accord.

Signature of Officer
Authorizing Movement

Pay Entitlements Affected by TAD

Introduction

Several pay entitlements may be affected by TAD assignment. The unit/PERSRU must ensure the member is aware of all entitlements which may be affected by a TAD order.

Reference

CG Pay Manual
- Section 3-B, Basic Allowance for Subsistence - Enlisted Members
- Section 3-F, Family Separation Allowance (FSA)
- Section 4-A, Foreign Duty Pay
- Section 4-B, Career Sea Pay

Affected pay entitlements

Use this table when counseling a member on which pay entitlements may be affected by a TAD order.

WHEN member goes TAD	THEN member
to a career sea pay eligible vessel/mobile unit,	is entitled to sea pay/time.
to a career sea pay eligible vessel/mobile unit AND is drawing BAS/SEPRATS (enlisted)	is entitled to sea pay/time. BAS/SEPRATS stops (exception for TAD to certain 65' vessels without messing facilities).
to a career sea pay eligible vessel/mobile unit AND is receiving foreign duty pay,	is entitled to sea pay/time. Foreign duty pay stops.
to a shore unit from a career sea pay eligible vessel/mobile unit over 30 days,	is not entitled to sea pay after 2400 on the 30th day.
to a career sea pay eligible vessel from a mobile unit,	is entitled to sea pay through the 30th day after departure from the vessel.
where messing is NOT essential,	is entitled to separate rations (enlisted)
over 30 days and has dependents	may be entitled to Family Separation Allowance (FSA-T).
from a career sea pay eligible vessel,	may not combine ship underway time with TAD time to qualify for FSA-T.
over 30 days	MAY lose entitlement to foreign duty pay and/or diving pay.
away from overseas permanent station	entitlement to Family Separation Allowance - Housing (FSH) will terminate on the 59th consecutive day of TAD.

Preparation of TAD Order (CG-4251) Blocks 1-11

Introduction

The CG-4251 is a form for issuance of civilian and military Temporary Additional Duty (TAD) orders. The CG-4251 can be prepared using Forms Menu software or a typewriter.

Procedure

This will assist you in completing blocks 1 through 11 of the CG-4251.

Block	Entry	Reference
1 **Name**	For individual travel enter the traveler's name in the following format: **LAST, FIRST, MI, SUFFIX**	
	For group travel enter the senior member's name in the following format: **LAST, FIRST, MI, SUFFIX, AND GROUP (SEE ATTACHED)**	PPPM 2-B-6
2 **Grade/ Rate**	The member's rate/rank and **pay grade** Example 1: **MK2/E5** Example 2: **LTJG/O2**	
3 **DIV/ Branch**	The member's command (and staff symbol) if any. Example 1: **ISC ALAMEDA (pru)** Example 2: **COMDT (G-WPM-2)**	
4 **Ext**	The member's duty phone number, including area code, and extension. Example: **7853573691X35**	
5 **Depart Date**	The date that the member is to depart the PDS and begin TAD travel, in the following format: **DDMMMYR** Example: **08DEC96** **Note:** If the member is taking leave or liberty and departing early enter the "constructive" date that the member would have departed to report on time had there been no leave or liberty authorized.	PPPM 2-B-7

Continued on next page

Preparation of TAD Order (CG-4251) Block 12

Introduction

Block 12 of the CG-4251 is used to

- document **WHY** the travel is being performed
- document **WHAT** is intended to be accomplished
- Show **HOW** the travel is to be performed
- indicate expenses authorized
- indicate travel advances authorized
- enter any special provisions for the travel
- document the availability/nonavailability of government quarters

Instruction

Follow these instructions to complete block 12 of the CG-4251.

- **Example entries can be found in enclosure (3) to this manual**

Step	Entry
1	The purpose and justification for travel.
2	The mode of travel.
3	Whether or not the member has a government travel card and the amount of advances authorized.
4	Any special instructions to the traveler.
5	If order is funded by an agency other than the USCG, include agency name, unit, department, phone number, billing address and Reimbursable Agreement Number (RAN) provided by the other agency. Also attach a copy of the authorization.
6	If the member is authorized per diem, state the maximum per diem rate for TAD locality (i.e., maximum lodging is $ _______ and maximum M&IE is $_______).
7	If needed, authorization for a rental car, include the size. • If size of car is other than a compact include justification.
8	If the member is traveling to a military installation you must enter a statement regarding the availability of government quarters and indicate whether or not the member is directed to use the quarters (See enclosure (3), page E-3-18, for example entries).

Note: If there is not enough space on the form to enter all the required information, continue on an attachment. Label the attachment with the traveler's name and the document ID number.

Preparation of TAD Order (CG-4251) Blocks 13-19

Introduction

This will assist you in completing the remainder of the CG-4251.

Procedure

Use these instructions to complete blocks 13-19.

Block	Description
13	Enter the date the individual requesting the travel signs the order, and the individual's signature.
14	Enter the accounting data from the message (or other document) ordering the member's TAD. Object codes can be found in the Finance Center SOP, Appendix F.
14a	Approving official signs and dates.
15	Accounting division will complete.
15a	Accounting division official signs and dates.
16	Enter appropriate information as required.
17	Enter appropriate information as required.
18	From: Enter the approving official's command. To: Enter the name of the traveler.
Dist.	Original and 4 copies to the member. Copy for unit files. Copy for accounting/finance office Copy for each command to which the member is to report Copy for PERSRU
19	Approving official signs and dates.

Section Overview

Introduction

This section will guide you through the process of accessing a member onto active duty.

In this section

Process for Accessions

Introductions

The accession process depends on communication between the member, unit, and PERSRU to ensure a smooth transition into the Coast Guard. This process is broken down into stages based on what needs to be completed and who is responsible.

Process

This is the process.

Stage	Who does it	What Happens
1	Member	Completes DD Form 2058 CG, IRS W4 Form, and appropriate state tax withholding certificate
2	Unit	Completes PCS Reporting Checklist, forwards with DD-2058 CG to PERSRU
3	PERSRU	• Creates PDR • Submits PMIS/JUMPS transactions • Contacts unit for additional information if needed. • If applicable starts MGIB allotment **Note: For members who are changing components of the Coast Guard with no break in service, the PERSRU must ensure that a discharge transaction (P203) has been completed on the member prior to transmitting accession transactions in PMIS/JUMPS**

Types of Accessions

Introduction

Accession is the process of establishing personnel and pay records when a member comes on active duty. There are several ways to be accessed and several points where members can be processed.

Types of accessions

This table describes types of accessions and identifies processing points.

Types	Description	Processing Points
Direct commission	When an officer comes from the civilian sector and is processed through officer basic training before departing for their first unit.	RTC Yorktown
Cadet Graduates	When a Cadet graduates from the Academy and becomes an officer.	Academy
Cadet	When a Cadet reports to the Academy.	Academy
Former Cadet with a reserve obligation	Non-Prior service cadets whose appointment is terminated in their junior or senior year are assigned to the Coast Guard Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation.	Academy
Prior service	When an enlisted member comes from another service and attends Basic Training (except REBI students).	Cape May
	When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training. **Note:** This includes members who are being discharged from the active duty component of the Coast Guard to be immediately accessed into the reserve component of the Coast Guard and vice versa. **The servicing PERSRU losing the member must submit the discharge transaction (P203).**	The PERSRU for the member's first permanent duty station (or first temporary duty station if member remains there for an extended amount of time)
	When a member reports directly to the Individual Ready Reserve (IRR).	Servicing ISC PERSRU
	If the member enlist in the reserves and attends Cape May as a REBI student.	The PERSRU that services the member's first permanent duty station
Recruits	When an enlisted member goes to basic training before departing for their first unit.	Cape May

Recalled Retired Members

Introduction

The Commandant may direct that a retired member be recalled to active duty. These members may be paid manually by HRSIC(RAS) or by PMIS/JUMPS depending on the duration of the recall.

Payment Method

Use this table to determine if the member will be paid by PMIS/JUMPS or manually by HRSIC (RAS).

If the member is	and the duration of the recall is	then the member is paid by
Immediately recalled to active duty upon retirement (no break in service)	for any period immediately following retirement	• PMIS/JUMPS. • The PERSRU will prepare a “Retirement with immediate recall to active duty” transaction with the effective date as the day prior to retirement (last day of active duty).
Recalled to active duty after a break in service of more than 24 hours	for 30 or more days	• PMIS/JUMPS. • The PERSRU will prepare the documents necessary to access member in PMIS/JUMPS.
Recalled to active duty after a break in service of more than 24 hours	for less than 30 days	• HRSIC (RAS) manually. • (RAS) will continue to deliver the member’s retired pay, but will change to active duty appropriation, and make an off-line payment for the balance of the active duty pay and allowances due to the end of the active duty period.
Recalled from RET-2 status	for less than 139 days	• HRSIC (CST) manually. • Member will coordinate with HRSIC (CST). **Note:** Refer to the next page for procedures on how to process these members.
Recalled from RET-2 status	for more than 139 days	• PMIS/JUMPS. • Is on extended active duty.

Recalled RET-2 Members

Definition

A member in a Retire 2 status is a member in the reserves retired with a 15-20 year letter.

Recalling RET-2 members for less than 139 days

The Commandant may recall a member in a RET-2 status to active duty. These members will be manually paid by PMIS/JUMPS, when the active duty period is less than 139 days. HRSIC (CST) will make payment when all documentation has been submitted.

The table below illustrates this process:

Stage	Who does it	What happens
1	CGPC	• Issues orders. • Sends original to member. • Sends copy to active duty unit (if active duty at other than CGPC). • Faxes copy of orders to HRSIC (CST).
2	Member	• Checks in at unit where active duty will be performed.
3	Unit	• Faxes copy of endorsed orders to HRSIC (CST).
4	HRSIC (CST)	• Submits PCS Departing and PCS Repo rting transactions to place member at active duty unit. • Submits R910 to establish TRA/PAY CAT. • Submits R990 to pay member for active duty period. **Note:** HRSIC (CST) will also submit PCS Departing and PCS Reporting transactions to return member to RET-2 status one update after the transactions above have been processed.
5	Member	• Completes travel claim (within three days of completion). • Sends travel claim to HRSIC (TVL).
6	HRSIC (TVL)	• Processes travel claim. • Issues payment for travel.
7	HRSIC (CST)	• Processes active duty pay manually. • Issues payment.

Immediate Separation Processing

Introduction

Immediate separations require 4 working days for processing after receipt of CGPC (epm-1) authorization to separate the member.

Procedures

Procedures required for an Immediate separation.

Day	Who does it	What happens
0	Unit	• Ensures member is physically qualified for separation. • Notifies PERSRU upon receipt of separation authority from CGPC. **Note:** For Immediate separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in the current Preparation and Submission of Administrative Remarks, COMDTINST 1000.14A) by the member must be faxed (785-295-2544) to HRSIC (SES).
	PERSRU	• Sends Urgent E-mail to SES/HRSIC with pertinent information using the format provided in Exhibit 3-B-1 and to SEPS/HRSIC requesting a Document Number and Accounting Data using the instructions provided in Exhibit 3-B-2. **Note**: The E-mails to SES/HRSIC and SEPS/HRSIC may be combined into one E-mail addressed to both entities. The E-mail(s) must be routed through and released by the PERSRU supervisor (with “By direction” authority). • Prepares and transmits a Change Tax (Address) Information transaction. **Note:** The Change Tax (Address) Information transaction must be completed to facilitate mailing of the final pay and the end of year mailing of the member’s IRS Form W-2.
1	HRSIC (MAS/CST) “SEPS”	Receives the PERSRU’s E-mail and provides Document Number and Accounting data to PERSRU via return urgent E-mail or Telephone.
	PERSRU	Receives Document Number and Accounting Data from HRSIC (MAS/CST) and issues Separation Order to the member using a Standard Travel Order Form and instructions contained in Exhibit 3-B-3.

Continued on next page

Immediate Separation Processing , Continued

Procedures (continued

Day	Who does it	What happens
1 T H R U 3	HRSIC (SES)	Upon receipt of the PERSRU's E-mail. • Calculates the final pay due the member. • Sends E-mail to the PERSRU with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized
4	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Orders, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter.
	PERSRU	Transmits the Personnel Action on the date of separation.

Priority Separation Processing

Introduction

Priority separations require 15 working days for processing. Therefore, to allow for weekends and holidays, the effective date of separation should be 21 calendar days after receipt by HRSIC of the PERSRU E-mail requesting expedited separation processing.

Procedures

Procedures required for a Priority separation.

Day	Who does it	What happens
0	Unit	• Ensures member is physically qualified for separation • Notifies PERSRU **Note:** For Priority separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in the current Preparation and Submission of Administrative Remarks, COMDTINST 1000.14A) by the member must be faxed (785-295-2544) to HRSIC (SES).
	PERSRU	• Sends Urgent E-mail to SES/HRSIC with pertinent information using the format provided in Exhibit 3-B-1 and to SEPS/HRSIC (requesting a Document Number and Accounting Data using the instructions provided in Exhibit 3-B-2. **Note:** The E-mail to SES/HRSIC and SEPS/HRSIC may be combined into one E-mail addressed to both entities. The E-mail(s) must be routed through and released by the PERSRU supervisor (with “By direction authority”). • Prepares and transmits a Change Tax (Address) Information transaction. **Note:** The Change Tax (Address) Information transaction must be completed to facilitate mailing of the final pay and the end of year mailing of the member’s IRS Form W-2.
2 THRU 9	HRSIC (MAS/CST) “SEPS”	Receives the PERSRU’s E-mail and provides Document Number and Accounting Data to PERSRU via return E-mail or Telephone.
	PERSRU	Receives Document Number and Accounting Data from HRSIC (MAS/CST) and issues Separation Order to the member using a Standard Travel Order Form and instructions contained in Exhibit 3-B-3.

Continued on next page

Priority Separation Processing, Continued

Procedures (continued)

Day	Who does it	What happens
1 THRU 8	HRSIC (SES)	Upon receipt of the PERSRU's E-mail. • Calculates the final pay due the member. • Sends E-mail to the PERSRU with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized. • Schedules a special payment through Treasury.
9	PERSRU	If the HRSIC (SES) separation E-mail is not received at least 7 days prior to the date of separation, contacts HRSIC (SES). Nonreceipt of the E-mail is an indication of a problem with the separation processing.
LAST DAY	Unit	On the effective date of separation, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter.
LAST DAY	PERSRU	On the effective date of separation, transmits the Personnel Action (or an Endorsement on Orders for reserve members being RELAD).

PERSRU TO HRSIC (SES) E-mail FORMAT

SUBJ: EXPEDITED SEPARATION FOR (NAME/SSN), USCG(R)

A. SITE MPC MESSAGE AUTHORIZATION (DTG)

1. CITE TYPE OF EXPEDITED SEPARATION: IMMEDIATE OR PRIORITY

NOTE: The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters:

FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC

2. DATE OF SEPARATION

3. SPD CODE

4. LEAVE INFORMATION (PERSRU must still input leave transactions)

   A. NUMBER OF DAYS LEAVE SELLING
   B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE
   C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS
   D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)

NOTE: Include any leave scheduled to be taken prior to separation. The PERSRU must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.

5. LOST TIME NOT POSTED IN RECENTS

NOTE: Enter 'NONE' when not applicable.

6. PAY ADJUSTMENTS NOT POSTED IN RECENTS:

   A. REDUCTION: RATE AND DATE
   B. FORFEITURE: AMOUNT AND DATE
   C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual)
   D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail)
   E. ENTITLEMENTS NOT POSTED IN RECENTS (PERSRU must still transmit necessary transactions)
   F. BONUS PAYMENTS PREVOUSLY MADE (SRB, SELRES, or Enlistment Bonus)

NOTE: Enter 'NONE' when not applicable.

7. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED ON THE CHANGE TAX (ADDRESS) INFORMATION TRANSACTION SUBMITTED THIS DATE IS

8. PERSRU POINT OF CONTACT (name and phone number)

NOTE: When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 98Jan01" vice "98Jan01").

EXHIBIT 3-B-1

Routine Separation Processing

Introduction Routine separations occur with sufficient lead time to allow routine processing.

Procedures Procedures required for Routine separation.

When	Who does it	What happens
At least 180 days prior to Separation	Unit	Ensures member is physically qualified for separation.
At least 45 days prior to Separation	PERSRU	Prepares and transmits Statement of Intent and Change Tax (Address) Information transactions to PMIS/JUMPS. **Note:** Failure to submit these documents in a timely manner will normally result in delay in final pay or payment for any leave sold. The PERSRU must notify HRSIC (SES) if there is any change to the information submitted on the Statement of Intent or Change Tax (Address) transactions. On routine separations, the amount of final pay will appear on the member's prior month LES.
At least 45 days prior to the members scheduled departure date	PERSRU	Requests Document Number and Accounting Data from HRSIC (MAS/CST) via E-mail (E-mail address: SEPS/HRSIC) **Note:** HRSIC will provide the information immediately upon receipt of the request.
Prior to separation	PERSRU	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.

Continued on next page

Routine Separation Processing continued

Procedures (continued)

When	Who does it	What happens
At least 10 days prior to separation	HRSIC (SES)	Notifies the PERSRU of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable).
7 days prior to separation	PERSRU	If information required for block 18 of the DD-214 (if applicable) has not been received, contacts HRSIC (SES).
Prior to separation	HRSIC (SES)	Inputs the necessary transactions to PMIS/JUMPS for final pay due the member.
Day of separation	Unit	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter.
Day of separation	PERSRU	Transmits Personnel Action (discharge) or Endorsement on Orders (RELAD) transaction.

REQUESTING A DOCUMENT NUMBER AND ACCOUNTING DATA FOR SEPARATION ORDERS

The responsible PERSRU shall request a Document Number and Accounting Data from HRSIC via **E-mail** (E-mail address: SEPS/HRSIC). **Send only 1 request per E-mail** Requests must contain the following information in the body of the **E-mail (do not send as an E-mail attachment):**

- Member's name, rank/rate and SSN.
- Member's permanent duty station OPFAC.
- Date of departure from the unit.
- Date of separation.
- Type of separation.
- Separation Classification (Routine/Priority/Immediate)
- City, State, and Zip Code of the member's separation address or other location to which he/she is entitled to travel and transportation of HHG.
- PERSRU Point of Contact and Telephone Number.

Note: The **E-mail** must be routed through and released by the PERSRU supervisor with "By direction" authority.

CANCELLATION OF DOCUMENT NUMBERS AND ACCOUNTING DATA

Separation Document Number and Accounting Data issued to a member who wishes to remain in the service must be cancelled.

In this event, the responsible PERSRU must send a **Coast Guard message** (not an E-mail) within 48 hours of discovering the need for cancellation to COMDT (G-WR-1) with HRSIC (SEPS/HRSIC), HRSIC (TVL), and the responsible Transportation Officer as information addressees, requesting cancellation of the Document ID.

The **message** should contain the following information:

- Member's rate/rank, name, SSN and unit.
- Document Number and Accounting Data issued; date issued
- Member's scheduled separation date.
- Reason for cancellation request and member's resulting status (e.g. Reenlisted, Extended, Retained). If member is retained provide reason, estimated duration and subsequent status at the end of retention.

NOTE: Members electing to remain in the service where actions to expend funds have been made (e. g. Shipment of household goods has occurred) shall be counseled on their liability and the applicable recoupment procedures. Such counseling shall be documented and acknowledged by the member's signature on their separation orders.

EXHIBIT 3-B-2

Checklist for Reenlistment or Extension

Introduction

This checklist provides a job aid to be used when a unit/PERSRU is completing necessary tasks for reenlistments or extensions and should be used along with the Checklist for Separations in section B of this Chapter. It is designed to be reproduced locally.

Step	Action	Reference	Date
1	Ensure member meets eligibility requirements.	1-G PERSMAN	
2	Advise member: • May **reenlist** up to 3 months prior to normal expiration of enlistment (however, member can reenlist prior to 3 months if he/she meets the requirements for a SRB (refer to SRB Instruction) or is reenlisting for convenience of the government (refer to Chapter 1-G of the PERSMAN). • Reserve members may **reenlist** up to 60 days prior to normal expiration of enlistment. • Prorated loss of reenlistment bonus for the period of early reenlistment/extension. • The saved leave balance and regular leave balance on the effective date of separation. • The number of days leave previously sold during career. • Centralized First Term Reenlistment Review (CFTRR) application process.	1-G PERSMAN	
3	Counsel member on SRB program.	SRB Instruction	
4	Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry).	12-B-47 PERSMAN	
5	Ensure member completes Career Intentions Worksheet and forward to PERSRU.	PPPM	
6	PERSRU forwards appropriate documentation to unit for member's signature.	PPPM	
7	Unit returns signed documentation to PERSRU for input into PMIS/JUMPS.	PPPM	
8	If member intended to discharge and decides to reenlist/extend, ensure member submits new Allotment Worksheet (if allotments stop).	PPPM	
9	Explain Article 137, UCMJ and Code of Conduct, Complete Page 7 (CG-3307) entry.	8-A-1 PERSMAN	

Continued on next page

Checklist for Reenlistment or Extension , Continued

SRB processing

Process table for Selective Reenlistment Bonuses.

WHEN	THEN
payment of the initial SRB installment is made,	SRB installment will be included in the first regular payment following processing of the reenlistment/extension transaction.
lump sum payment is approved by CGPC (epm)	lump sum SRB payments will be processed by HRSIC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction.

Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

These are the basic rules (per Art. 7-A-20, PERSMAN) for selling leave upon reenlistment or entering the first extension an enlistment.

- Members reenlisting within 90 days of their normal expiration of enlistment date, or extending their current enlistments for the first time, may receive payment for lump sum leave, not to exceed a career total of 60 days leave.
- Members reenlisting more than 90 days prior to their normal expiration enlistment date or reextending their current enlistments **MAY NOT** receive payment for lump sum leave.

Payment for lump sum leave will be included in the first end month payment following successful processing of the reenlistment/or begin service under first extension transaction.

Procedures for members with more than 90 days remaining on first enlistment

Members approved for retention under CFTRR, who desire to sell leave, but are not within 90 days of their normal expiration of enlistment, should enter into an agreement to extend their enlistment to meet the obligated service requirement.

- These members will be eligible to sell leave when their first extension of enlistment becomes effective.

Immediate Enlistment in the Coast Guard Reserve Upon Discharge from the Regular Coast Guard

Introduction

Members in the regular Coast Guard being discharged may immediately enlist in the Coast Guard Reserve if they meet eligibility requirements.

Reference

- CG Personnel Manual, COMDTINST M1000.6 Section 1-G

Definition

The term **immediate enlistment** means within 24 hours following separation from the regular Coast Guard.

Procedures

The District Commander (at) of the district or the Commanding Officer of the ISC (fot), where the member will reside following separation from the regular Coast Guard must approve the member's Coast Guard Reserve Assignment Request and Orders, (CG-5525), before the member may enlist in the Coast Guard Reserve.

Detailed instructions for completing and processing the CG-5525 can be found on the reverse side of the form. The process is summarized below:

- The servicing PERSRU will send all members who are eligible for reenlistment a Coast Guard Reserve Assignment Request and Orders form (CG-5525), with items 1 through 6 completed, 4 months prior to the date of separation.
- The member will complete items 7 through 11 and forward the form to the appropriate district (at), or ISC (fot) even if they do not desire to affiliate with the selected reserve
- If approved for enlistment in the Coast Guard Reserve the member shall be processed for discharge from the regular Coast Guard and enlistment in the Coast Guard Reserve by the PERSRU servicing the member at the time of separation using the **Routine Separation Procedures** listed in Section 3-B of this manual.

Enlistment in Coast Guard Reserve after 24 hours

Enlistment in the Coast Guard Reserve after 24 hours following discharge from the regular Coast Guard must be processed at a Coast Guard recruiting office.

Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

Introduction

Coast Guard Reserve members serving on extended active duty of 12 months or more may be authorized to enlist in the regular Coast Guard if they meet eligibility requirements.

Reference

- CG Personnel Manual, COMDTINST M1000.6 Section 1-G

Procedures

The member shall be processed for discharge from the Coast Guard Reserve and for enlistment in the regular Coast Guard by the regular PERSRU handling the member's records, using the following procedures:

When	Who does it	What Happens
In time to allow approval prior to date of reenlistment	Member	Submits letter request for reenlistment to Commander (CGPC-EPM) via chain of command as prescribed in the reference.
At least 45 days prior to effective date	PERSRU	Prepares and transmits a Statement of Intent (SOI) transaction to PMIS/JUMPS.
Day of discharge	Unit	Delivers DD form 214 to member.
Day following discharge	PERSRU	Transmits a Discharge transaction (P203) and an Enlistment into the Coast Guard transaction to PMIS/JUMPS.
If applicable	HRSIC (SES)	Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the Selective Reenlistment Bonus.

Reservist on extended active duty

Coast Guard Reserve members who desire to enlist in the regular Coast Guard, and who are **NOT** currently on extended active duty of 12 months or more, must be processed at a Coast Guard recruiting office.

Section Overview

Introduction

This section will guide you through the process and procedures to report completion of formal training courses, educational accomplishments, and qualification changes.

In this section

Training and Educational Accomplishments

Introduction

Completion of formal training courses and other educational accomplishments must be recorded in the PMIS/JUMPS system.

References

- Training and Education Manual, Chapter 4, Individual Career Training & Development Plans and Unit Training Plans
- Reserve Administration and Training Manual, Article 12-C-9, Retirement Points

Formal Training Courses

This is the process of reporting completion of a formal training course such as Civil Rights/Human Relations Awareness Training.

Stage	Who does it	What Happens
1	Member	completes a Career Development Worksheet (CG HRSIC-2030) **Note:** If more than one member of the unit attended the same course, at the same time, the unit may submit a list of attendees in lieu of individual worksheets.
2	Unit	forwards worksheet or list of attendees to PERSRU.
3	PERSRU	completes appropriate PMIS/JUMPS transaction.

Continued on next page

Adding and Deleting Qualification Codes

Introduction

Qualification Codes are used as a means of recording a member's accomplishments while in service. This section helps you determine when to add or delete enlisted qualification codes.

Reference

Enlisted Qualification Codes Manual, Chapter 2, Enlisted Qualification Code Assignment

Adding a qualification code

Add a qualification code for a member.

WHEN	THEN
a member completes school and receives a qualification code	forward Career Development Worksheet to the PERSRU.
a member is assigned a qualification code by the unit CO	the CO will forward a letter to the PERSRU and provide a copy to the member.
a member completes small arms training and receives a qualification code	forward Career Development Worksheet to the PERSRU.

Deleting a qualification code

Delete a qualification code for a member.

WHEN	THEN
the member has more than 12 qualification codes	the CO may remove the lesser qualification code and send Career Development Worksheet to the PERSRU.

Note: In specific cases, correspondence may be directed to Commandant (G-WT). See reference for guidance.

Company Commander Insignia

Introduction

When a member becomes qualified to permanently wear the Company Commander Insignia, this qualification must be reported to the PERSRU for entry into PMIS/JUMPS.

Reporting this qualification

When a member becomes qualified to permanently wear the Company Commander Insignia, the following must occur:

Stage	Who does it	Action to be taken
1	UNIT	• The unit will prepare a designation letter to the member. • A copy of the designation letter will be sent to the PERSRU.
2	PERSRU	Will record this qualification on a Record Award Information transaction (305), using award code 'CC'. This information will be processed in PMIS/JUMPS.

Section Overview

Introduction

This section will guide you through the process of electing, increasing, reducing, declining, or canceling SGLI coverage, reporting casualties, and reviewing a BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) for a member.

In this section

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A)

Purpose

The BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) is an official document required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Insurance companies to be notified in case of death
- U.S. Government Life Insurance, National Service Life Insurance in force
- Servicemembers' Group Life Insurance participation
- Record dependents as defined in the Coast Guard Pay Manual, COMDTINST M7220.29 (Series) to determine dependency for BAH entitlement purposes
- Verify (on an annual basis) that dependents, on whom BAH is being paid, continue to be related to and supported by the member.

Other uses for the CG-4170A

The CG-4170A may be used as partial supporting documentation as long as the individual claimed as a dependent remains a dependent.

Here are some examples of when the CG-4170A may be used as partial supporting documentation:

- Payment of family separation allowance and/or family separation - housing
- Payment of station allowances at the with dependents rate
- Payment of dislocation allowance at the with dependents rate
- When applying for dependent ID cards and DEERS privileges

Continued on next page

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Continued

Cases not to use the CG-4170A

Do not use the CG-4170A to designate a beneficiary or change amount of coverage for:

- National Service Life Insurance
- Servicemembers' Group Life Insurance (use VA Form SGLV-8286)
- Government Life Insurance

When to submit the CG-4170A

The CG-4170A will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Anytime a member acquires an initial or additional dependents
- When any material change occurs in dependency status. (Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)

Note: When removing any dependent from the CG-4170A that originally required HRSIC approval of the dependent, a copy of the new CG-4170A must be forwarded to HRSIC (LGL).

- Changes to the form occurring in any item

Continued on next page

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Continued

Overview of the CG-4170A

Item by item description.

<table>
<tr><th>Item</th><th colspan="2">Description</th></tr>
<tr><td>1</td><td colspan="2">The member’s Social Security Number.</td></tr>
<tr><td>2</td><td colspan="2">The member’s last name, first name, and middle initial.</td></tr>
<tr><td>3</td><td colspan="2">the member’s rate or rank.</td></tr>
<tr><td>4</td><td colspan="2">The member’s current duty station.</td></tr>
<tr><td>5</td><td colspan="2">Unit ID number (DD-OPFAC).</td></tr>
<tr><td>6</td><td colspan="2">Servicing PERSRU’s OPFAC number and name.</td></tr>
<tr><td>7</td><td colspan="2">The member’s date of birth.</td></tr>
<tr><td rowspan="13">8</td><td colspan="2">The member’s marital status and spouse relationship code.</td></tr>
<tr><th>Code</th><th>Meaning</th></tr>
<tr><td>1</td><td>Married and spouse not in service.</td></tr>
<tr><td>2</td><td>Married and spouse is on active duty.</td></tr>
<tr><td>3</td><td>Marriage is in an interlocutory status.
Spouse is not on active duty.</td></tr>
<tr><td>4</td><td>Marriage is in an interlocutory status.
Spouse is on active duty.</td></tr>
<tr><td>5</td><td>Member is legally separated from spouse.
Spouse is not on active duty.</td></tr>
<tr><td>6</td><td>Member is legally separated from spouse.
Spouse is on active duty.</td></tr>
<tr><td>7</td><td>Married and spouse in reserve component.
(Drilling and IRR).</td></tr>
<tr><td>A</td><td>Member’s most recent marriage ended in annulment.</td></tr>
<tr><td>D</td><td>Member’s most recent marriage ended in divorce.</td></tr>
<tr><td>S</td><td>Member has never been married.</td></tr>
<tr><td>W</td><td>Member’s most recent marriage ended due to death of spouse.</td></tr>
</table>

Continued on next page

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Continued

Overview of the CG-4170A (continued)

Item	Description
9	Date of marriage.
10	City or County, State and Country of member's marriage.
11	Spouse's branch of service (if applicable).
12-21	• Spouse information - Name, address, phone numbers, BAH status, date of birth, dependency date and whether or not to notify in case of emergency. • Children information - Name, address, phone numbers, BAH status, date of birth, dependency date of all children (regardless of age) including those from former marriages, adopted children, wards, stepchildren or illegitimate children and whether or not to notify in case of emergency. • Parent information - Name, address, phone numbers, BAH status, dependency date, of the member's adult Next of Kin or close friend not named above, and whether or not to notify in case of emergency. • Minors receiving support information - Name, address, phone numbers, BAH status and dependency date, of any person other than spouse or children under 21 who is receiving 50% or more of their support from the member, and whether or not to notify in case of emergency.
22	SGLI information from the member's most recent SGLV-8286 form.
23	HRSIC approval of dependents for BAH (if required).

Continued on next page

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Continued

Overview of the CG-4170A (continued)

Item	Description
24	The name, relationship, address, and phone number of the beneficiary(ies) member desires to receive the 6-month death gratuity in the event they are not survived by a spouse or children. Parents/brothers/sisters only.
25	The name, relationship, address, and phone numbers of the beneficiary(ies) member desires to receive any unpaid pay and allowances due at the time of death, and the % paid to the beneficiary.
26	The name, relationship, address, and phone numbers of the person to receive allotment of pay if members is missing or unable to transmit funds. Also the % of pay that is to be sent monthly.
27	Full name of any insurance company, address, and policy number(s).
28	Remarks.
Members Certification	If correct, member signs in item 29. • If incorrect, complete a new CG-4170A. The signature will be witnessed in item 30. Date the form in item 31, the date signed.
Distribution	Original to CGPC (adm-3). Copy to PERSRU. Copy to unit.

Servicemembers' Group Life Insurance (SGLI)

Introduction

Servicemembers' Group Life Insurance was established for the purpose of making life insurance protection available to members of the Uniformed Services at a reasonable cost. This information will assist the member when electing, increasing, reducing, declining or canceling coverage.

Reference

- CG Personnel Manual, Article 18-D-4 and 18-D-5, Servicemembers' Group Life Insurance (SGLI) and Veterans' Group Life Insurance (VGLI)
- VA Handbook 29-75-1 (Revised April 1994), Servicemembers' and Veterans' Group Life Insurance Handbook

Automatic coverage

SGLI will automatically insure all newly accessed members for $200,000 and allow them to either:

- decline coverage of SGLI or,
- elect a reduced level of coverage of SGLI in multiples of $10,000.

Note: SGLI coverage continues (at no cost to the member) for a period of 120 days following separation or release from active duty.

Coverage for reserve members

Members who join the Ready Reserve after release from active duty are eligible to continue their SGLI coverage for as long as they remain in the Ready Reserves (members who are assigned to units or positions in which they may be required to perform active duty, or active duty for training, and each year are scheduled to perform at least 12 periods of inactive duty training creditable for retirement purposes). The reserve member is also eligible to convert their active duty SGLI coverage to VGLI coverage. A reserve member can also be insured under both programs, at the same time, provided the combined coverage does not exceed $200,000. In most instances these individuals will probably choose to carry the SGLI coverage since it costs less than VLGI coverage. The reserve member should also be advised, however, that although VGLI may cost more than SGLI, VGLI guarantees lifetime coverage whereas SGLI does not. The reserve member should also be advised that ready reservist SGLI coverage cannot be converted to VGLI coverage upon separation from the reserves. Reserve members in this situation should be cautioned to seriously consider a combination of coverages in order to guarantee some degree of lifetime coverage.

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Coverage for reserve members, continued

The following reserves are also eligible for SGLI coverage:

- Reservists awaiting retired pay at age 60 (RET-2, OPFAC 87600)
- Reservists assigned to the Transition SELRES (OPFAC 87300)
- Reservists assigned to the IRR (OPFAC 87400)
- Reservists assigned to RET-3 (OPFAC 87900)

Note: Reservists retired with pay may be eligible for VGLI coverage and may obtain an application from their local VA regional office or the office listed below:

OFFICE OF SERVICEMEMBERS' GROUP LIFE INSURANCE
213 WASHINGTON STREET
NEWARK NJ 07102-2999
Phone: 800-419-1473 or 201-802-8840

Payment of SGLI premium

Premium payments for active duty personnel and reservists eligible to receive drill pay will be through automatic payroll deduction and reflected on the member's LES.

Note: Reservist enrolled in SGLI who do not drill temporarily, but remain in a good pay status, will accrue a negative SGLI premium. Upon resumption of a drilling status, the system will deduct the negative premium balance from the member's pay. If the member does not drill for pay within two months and no SGLI payments is made, SGLI coverage will be administratively terminated.

For payment by check or money order, remit payment to " U.S. Coast Guard" and forward to:

COMMANDING OFFICER (DC)
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER
ATTN: SGLI
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Payment of SGLI premium, continued

Ensure payment is clearly marked " SGLI PAYMENT" and includes the following information:

- member's name
- member's SSN

For payment by credit card (Visa or Master Card) call HRSIC (DC) at (785) 357-3610.

Procedures for electing coverage or increased coverage previously declined or decreased

If a member previously elected to cancel SGLI, reduce SGLI, or not be insured of SGLI at all, and later wants to obtain or increase existing SGLI coverage, a written request must be made by the member. Application must be made on the Request for Insurance (SGLV-8285), in accordance with instructions contained on the back of the form.

The form SGLIV-8285 should be completed and signed by the member in the presence of an authorized representative of his/her command, who should then complete the certification below the member's signature.

Use the following table to determine if approval by the Office of Servicemembers' Group Life Insurance (OSGLI) is required before coverage can be increased or restored:

If	Then
Member answers " NO" to item 11, and all parts of items 12 and 13	Member meets the "proof of good health" requirement. SGLI can be increased or restored. Forward original to CGPC (adm-3) with SGLV-8286. Send copy to PERSRU.
Member answers " YES" to item 11 or any part of item 12 or 13	The SGLV-8285 must be sent to the OSGLI for review and approval. SGLI may not be increased or restored until approval has been received from OSGLI.
Approval has been obtained by OSGLI on the member	Forward original to CGPC (adm-3) with SGLV-8286. Send copy to PERSRU.

Procedures for reducing or declining coverage

A member who desires a reduced amount or declines coverage must complete a Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286). Reduction or cancellation will be effective at midnight of the last day of the month in which an SGLI transaction (P809) is processed by HRSIC.

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286)

Members who have SGLI coverage must complete the Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286) whenever he/she makes a beneficiary designation or changes a previous designation. The Servicemembers' and Veterans' Group Life Insurance Handbook (VA Handbook 29-75-1) should be available for the member to read when completing this form. The following are guidelines to be used in the preparation and distribution of the SGLV-8286 Form:

Instructions for completing the SGLV-8286

Instructions for completing the SGLV-8286 are on the reverse side of the form. The member must read the instructions before attempting to complete the form. Use of an original multi-part carbon form is preferred. Photo copies of the form may be used if necessary. Copy the front and reverse sides of the form.

Note: If using a photo copy, prepare an original (do not have the member sign until copies are made) and two copies. After the copies are made, the member must sign the original and both copies.

When a member should designate a specific beneficiary(ies)

Members should be encouraged to name a specific beneficiary. Use of "By Law" designation should be discouraged. There are many instances when the member should clearly designate a specific beneficiary(ies) such as:

- When a member has a parent who has remarried but both natural parents are living; or
- When a member is divorced and remarried, but has children living with the first spouse; or
- When a member has no immediate next of kin and wants a distant relative or friend to receive the proceeds.

Designating Principal Beneficiary(ies) on the SGLV-8286

The Primary Beneficiary should be a primary individual or individuals designated to receive insurance proceeds.

When designating multiple principal beneficiaries - the member should specify in percentile the shares to be paid to each; otherwise, they will share equally in the proceeds. The total amount of proceeds must be equal to 100% (i.e., spouse 75% and child 25%).

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued	**Designating Contingent Beneficiaries on the SGLV-8286**	The contingent Beneficiary is a secondary individual or individuals designated to receive insurance proceeds in the event that the principal beneficiary is no longer living. When designating multiple contingent beneficiaries, the member should specify in percentile the shares to be paid to each, otherwise, they will share equally in the proceeds. As with the Principal Beneficiaries, when designating multiple contingent beneficiaries, the total amount of proceeds must be equal to 100% (i.e., father 50% and sister 50%).
	Designations of beneficiaries who are minors	Notwithstanding the provisions of any other law, payment of SGLI may be made directly to a surviving spouse who is a minor on his or her own behalf, and payment in such case shall be complete acquittance to the insurer. When a member wishes to name minors as beneficiaries (such as his or her own children, nephews, nieces, etc..), the member should be advised that the proceeds of the insurance cannot be paid to a minor beneficiary, other than a minor surviving spouse, without a court-appointed guardian. The appointment of a guardian is often time consuming and costly and, for that reason, may delay the payment of the proceeds. The amount of the proceeds can be greatly reduced by the payment of court costs, attorney fees and expenses incurred by the guardian. One way to avoid such complication and expense is to designate, a pre-appointed trustee of the minor beneficiary. Otherwise, members who insist on designating minors as SGLI beneficiaries should be referred to legal counsel (such as legal support attorney) for advice on establishment of a trust.

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued

If member does not designate a Beneficiary(ies)

If a member does not designate a beneficiary, the insurance will automatically be paid in the following order of precedence:

- The surviving spouse of the member, if none,
- The child or children of the member, in equal sharers, with the share of any deceased child to be distributed among the descendants of that child; if none,
- The parents in equal shares or all to a surviving parent; if none,

  Note: A member's biological parents are not always who the insured intended to receive the proceeds, and in cases such as abandonment, they are not recognized as legal parents. Claim disputes involving the recognition of "rightful" parents can be avoided by discouraging the use of "By Law" designations and listing parents by name.
- A duly appointed executor or administrator of the insured's estate; if none,
- Other next of kin

When a member is likely to be survived by dependents or parents and designates some other person or entity as beneficiary, a responsible representative should counsel the member to the fact that the Servicemembers' Group Life Insurance Act was specifically designed to provide some form of security for dependents or parents. The member should be encouraged to designate such dependents or parents as beneficiaries.

Note: Under no circumstances should a member be compelled to designate any beneficiary. Designation is a matter of free election for the insured, and the insured should never be forced to designate otherwise. However, when dependents or parents are disregarded in designating beneficiaries, it is desirable that the voluntary nature of the designation should be a matter of record.

A witness must be present when SGLV-8286 is completed by the member

The SGLV-8286 must be witnessed in the appropriate blocks by an authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Unit Yeoman, PERSRU Yeoman, etc..). The date the form is received and witnessed should be accurately recorded as it determines the reduction or cancellation date of the insurance, and is the basis for establishing payroll deductions or authorizing collections in a reduced amount.

Continued on next page

Servicemembers' Group Life Insurance (SGLI) , Continued

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286), continued

Common errors on the SGLV-8286

Common errors that are made to the SGLV-8286 Form:

- The form is not being filed in the member's unit PDR and PERSRU PDR.
- Members are designating minors as principal or contingent beneficiaries (unless the minor is legally emancipated, they can't receive the payment).
- The form is not signed by the member.
- When the form is completed by the member, there is no witness or witness signature.
- The sum total of either the primary or contingent beneficiaries does not equal 100%.
- By law designations. Most DOD services have specific policies prohibiting this election, which can result in delays in payment, or the member not completely understanding how the funds will be distributed.

Process and Distribution of SGLV-8286

The following table describes the responsibilities associated with the SGLV-8286 and the distribution of the form:

Stage	Who does it	What Happens
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Unit	• Forwards original to CGPC (adm-3) • Forwards part 2 (or signed copy) to PERSRU • Files part 3 (or signed copy) in unit PDR attached to the BAH/Dependency/Emergency Data and SGLV Validation (CG-4170A)
3	PERSRU	If necessary, completes the Elect/Decline SGLI Transaction (P809). **Note**: If SGLI was administratively terminated due to the arrears of premiums, the PERSRU will not restart SGLI until delinquent premiums have been paid and Form SGLV-8285 has been completed per page 5-A-9 of this section.

Casualty Reporting

Introduction

This information is provided to direct you through the process of casualty reporting.

Reference

CG Personnel Manual, Section 11-A, Casualties

Reporting procedures

Reporting procedures are covered in the Personnel Manual along with the disposition of personal effects.

Examples of the following are contained in Enclosure (7) of this manual.

- personnel casualty report message
- letter for death determination
- telegram notification to next of kin
- letter notification to next of kin

Inventory and Disposition of Personal Effects

In cases where a member dies or is missing, compete a CG-3853 (Personal Effects Inventory and Disposition) in accordance with Section 11-A of the Coast Guard Personnel Manual, COMDTINST M1000.6 (series). Distribute the form as follows:

Original and two copies: To the officer designated by the Commanding Officer to assume custody of the effects.

- Officer retains original
- One copy is to be packed with personal effects.
- Second copy is sent to next of kin (If personal effects are shipped to next of kin. Otherwise, second copy goes to Supply Center, Baltimore. IAW Art. 11-A-11.b(3) PERSMAN

Copy: Unit PDR

Copy: COMDT (G-WPM) (if deceased, captured, missing or incapacitated) PERSCOM ((epm), for enlisted/(opm) for officers) if absent at time of sailing, AWOL, AOL, or deserter.

Copy: Unit File

Continued on next page

Casualty Reporting, Continued

Disposition of Military Personnel Data Records (PDRs)

The unit shall forward Unit and Medical PDRs to the servicing PERSRU within two days of:

- Declaring member a deserter
- Member's death

The servicing PERSRU shall forward Unit, Medical, and PERSRU PDRs to Commander (adm-3), Coast Guard Personnel Command within 5 days of the date of death or date member was declared a deserter.

Note: Complete instructions for PDR maintenance and disposition can be found in COMDTINST 1080.10 (series), Military Personnel Data Records (PDR) System, which is reprinted as Appendix (D) to this manual.

Section Overview

Introduction

This section will guide you through the procedures required for members with dependents. It will assist you in reporting dependency changes, enrolling in the Family Member Dental Plan, and issuing dependent ID cards.

In this section

Dependency Information

Introduction

In order to avoid overpayment, underpayment and to determine eligibility for benefits and privileges administered by the uniformed services, members must notify their units/PERSRUs immediately upon a change in dependency status.

References

- CG Pay Manual, Basic Allowance for Housing (BAH), Members with Dependents
- DOD Instruction 1000.13(series), Identification Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals.

Note: DODINST 1000.13 is reprinted as Appendix (b) to this manual.

Responsibility

The member has responsibility for reporting dependency status changes. Complete a Dependency Worksheet (CG HRSIC-2020) (see enclosure (1) of this manual for blank form) if a member:

- Gets Married, Separated or Divorced
- Has an incapacitated child who turns 18

Note: If the member is approaching retirement, forward supporting documentation regardless of the age of the child

- Gains or loses a dependent (e.g., after a dependent dies, marries or divorces and reverts to dependent status)
- Has a questionable case of dependency

Final divorce decree not available

To avoid overpayment, members with no other dependents who are awaiting a copy of a final divorce decree should request payment of BAH, OHA and/or COLA at the with dependents rates be stopped effective the date the divorce will become final. The divorce decree must be provided when it becomes available.

Systems that need to be updated

When a member reports a change in dependency, the information is recorded in the PMIS/JUMPS system, for pay purposes, and in the Defense Eligibility Enrollment System (DEERS), to record eligibility for benefits and privileges.

Continued on next page

Dependency Information, Continued

Annual Verification

Annually, during the month of November, members must verify their dependency data on form CG-4170A. Refer to Section 5-C of this manual for procedures on the annual verification.

Note: Redetermination of unique dependency status cases conducted by HRSIC (LGL) will be conducted only during the annual verification of the CG-4170A.

Forms

This table shows the forms that may be needed when a member has a change in dependency. To determine when to use a form and the procedures for completing the form, consult the reference.

Form	Purpose	Reference
Application For Uniformed Service Identification Card- DEERS Enrollment (DD-1172)	Determine entitlement to ID cards, medical care, exchange, theater, and commissary privileges. Update DEERS database	PPPM 5-B-15 and APPEN (B)
BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A)	Update PMIS/JUMPS, determine eligibility for payment of BAH with dependents, casualty reporting, list next of kin and designate beneficiaries	PPPM 5-A-2
FMDP Enrollment Election (DD-2494)	Family Member Dental Plan enrollment or termination	PPPM 5-B-4
Dependency Worksheet (CG HRSIC-2020)	Provide dependency information to PERSRU	PPPM Encl. (1)
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	PPPM 5-B-12 and APPN (B)
Full-Time Student Statement (CG HRSIC-2020B)	Supporting documentation for a member claiming a child over age 21 as a dependent	PPPM Encl. (1)
SGLI Election and Certificate (SGLV-8286)	Elect SGLI amount and designate beneficiaries	PPPM 5-A-7
Support Statement (CG HRSIC-2020A)	Supporting documentation for a member claiming a parent or parent-in-law as a dependent	PPPM Encl. (1)
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	PPPM 5-B-10 and APPEN (B)

Family Member Dental Plan

Introduction

The Family Member Dental Plan (FMDP) is an optional government sponsored insurance plan for CHAMPUS eligible dependents of active duty personnel. Enrollment in the plan is not automatic, but requires positive enrollment by the sponsor. The family members must be enrolled in DEERS before enrolling in the FMDP (see page 5-B-17).

FMDP premiums

There are two premium rates:

- Single - members with only one dependent enrolled
- Family - members with two or more dependents enrolled

Automatic premium changes

Premiums will automatically change (if applicable), when dependent:

- Child turns
  4 years old
  21 years old and is not enrolled in a full time course of instruction,
  23 years old and is a student, or
- Status changes

Enrollment requirements

Enrollment into FMDP is subject to the family member(s) being enrolled in DEERS (prior to applying for enrollment in FMDP), and the family member(s) must remain enrolled for a minimum of two years.

- Active duty members (other than overseas returnees, see note below) that have less than 24 months remaining in the service may enroll their dependent(s) if they indicate on the enrollment election forms that they intend to remain on active duty for the minimum 24 month enrollment period. This does not apply in the case of Reservists serving on long term TEMAC or SADT, their orders must be issued for a period of 24 or more months in order to enroll in the FMDP, regardless of the member’s intent to remain on active duty.

Note: An exception to this rule is allowed for sponsors and family members who are returning from an overseas location where FMDP is not available and the sponsor has between 12 and 23 months remaining in the service. The sponsor must enroll within 30 days of reporting to a CONUS unit.

Continued on next page

Verification of Eligibility for the DD Form 1173 , Continued

If eligibility cannot be established (continued)

Army	COMMANDER, TAPC ATTN: TAPC-PDO-IP 200 STOVALL AVE. ALEXANDRIA VA 22332-0474 (707) 325-9590
Navy	COMMANDING OFFICER BUREAU OF PERSONNEL PERS-334 WASHINGTON DC 20370-5334
USPHS	(301) 443-9000
NOAA	(301) 443-8616

Entitlements on the DD Form 1173

Eligibility of the spouse and unmarried children of active duty members may be certified if information on the DD Form 1172 is the same as indicated on the approved BAH/Dependency/Emergency Data and SGLI Validation Form, CG-4170A. Entitlements can be determined by referring to Appendix (B) of this manual.

Reserve Family Member Identification Card

Introduction

The Reserve Family Member Identification Card (DD Form 1173-1) was developed for use by all military services. The Coast Guard uses it for identification only. It has no authorization for access to military benefits unless accompanied by a set of valid active duty orders, Commissary Privilege Card, or pay voucher.

How to apply

The process for applying for a DD Form 1173-1:

If	Then
the member is from the Selective Reserve,	submit a DD Form 1172 to any unit authorized to issue ID cards
the member is from the Ready Reserve or Retired Reserve,	submit a DD Form 1172 to HRSIC (RAS)

Dependent eligibility

A dependent is considered to be a spouse, child, stepchild, or ward.

If	Then the dependent is
the dependent's sponsor is in the Ready Reserve (which includes the Selective Reserve and the Individual Ready Reserve) or Retired Reserve,	eligible.
the dependent is over 21 or under 10, a former spouse, or requires dependency determination,	ineligible.

Continued on next page

Section Overview

Introduction

This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

In this section

Annual Verification of CG-4170A

Introduction

Annually during the month of November, members must verify their dependency data on form CG-4170A. Redetermination of unique dependency status cases will also be conducted during this annual verification.

Verification of the CG-4170A

This is how verification of the CG-4170A works:

Stage	Who does it	What Happens	
1	PERSRU	Forwards CG-4170A to unit **Note**: PERSRUs have the option to use a stamp in block 28 (Remarks) of the CG-4170A to record the member's annual certification, rather than printing a new CG-4170A each year. The stamped entry should read: "ITEMS 9 THROUGH 27 CERTIFIED CORRECT" With spaces for the member's signature and date signed .	
2	Unit	Ensure member verifies CG-4170A on 1 November	
3	Member	**If**	**Then**
		All information is correct	Signs in block 29, or in block 28 if space is available, and returns the CG-4170A to unit
		Changes or corrections are needed	Makes pen and ink changes to form, and if necessary: • Completes a Dependency Information Worksheet (encl. (1) to this manual) if adding a BAH eligible dependent • Completes a new SGLV-8286 form if any information in block 22 is incorrect Returns the CG-4170A to unit (with worksheet and/or SGLV form, if required)
4	Unit	**If**	**Then**
		All information is correct and member has signed original	• Forward original to CGPC (adm-3) • Forward copy to PERSRU • File copy in Unit PDR
		Corrections are needed	Forwards the changes to the PERSRU
5	PERSRU	**If**	**Then**
		No changes were noted by member	Files copy of verified CG-4170A in PERSRU PDR
		Changes were noted by member	Completes a new CG-4170A and forwards to unit for member's signature.

Requesting Statements of Creditable Service

Introduction

This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).
Note: For NOAA personnel, NOAA HQ issues SOCS vice HRSIC (SES).

Procedure for requesting Statements of Creditable Service

This is the procedure for requesting statements of creditable service/sea service on a USCG/USCGR member with a Pay Base Date (PBD), Active Duty Base Date (ADBD) and/or creditable sea time problem, or a newly assigned USCG/USCGR member with prior service which has not been verified. A SOCS is required for all members entering the USCG/USCGR if they have any prior military service.

Note: Do not ignore suspected sea time errors just because a member is not currently assigned to a sea pay eligible vessel. Take immediate action. A recent change to advancement criteria makes sea time a factor for advancement. Sea time can also have an impact on PCS assignments.

Stage	Who does it	What happens
1	UNIT	Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the PERSRU. • Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service. • If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (HRSIC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-8 of this section for requirements on requesting TOSS).
2	PERSRU	Reviews the PMIS data base (item #6 'SOCS-DT" on any PMIS/JUMPS Inquiry Screen) to verify whether or not a SOCS has already been completed. • If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of service/sea service, request a SOCS/SOCSS from HRSIC (SES) by rapidraft letter and attach all supporting documentation. **Note:** Please ensure that periods of Coast Guard sea service or ADT that are in dispute have been processed via the PERSRU transmittal. HRSIC (SES) cannot add this time unless the proper PMIS transactions have been transmitted.

Continued on next page

Requesting Statements of Creditable Service

Procedure for requesting Statements of Creditable Service, Continued

How to process a Statement of Creditable Service/Sea Service, continued:

Stage	Who does it	What happens
2	PERSRU **Continued**	**VERY IMPORTANT**: If there is a DD-214 supporting sea service, and the member's sea pay longevity is incorrect, you can request an immediate adjustment to their longevity. The request must be sent to HRSIC (SES) and must indicate: "The member has been counseled and understands that if the total sea time added, based on the DD-214 is not supported by the prior service records that the member will be in an overpaid status".
3	HRSIC	Is responsible to verify and validate all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADBD) or cumulative sea service time. • Request records from Headquarters or from the appropriate record c enter (if applicable). This process is the most lengthy. • Verifies dates. • Issues member a SOCS (HRSIC Form 1071) and/or a SOCSS (HRSIC Form 1072). • Makes necessary adjustments to member's pay account. **Note:** Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The hard part is getting the information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by HRSIC before submitting any follow-up or tracer requests.
4	PERSRU	Once the SOCS/SOCSS has been forwarded to the PERSRU, ensure a copy is retained in the PERSRU PDR, and forward a copy to the unit requesting verification. **Note:** If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to HRSIC (SES) by rapidraft, with the periods in dispute clearly addressed.
5	UNIT	After HRSIC completes the SOCS/SOCSS and the PERSRU forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADBD, or cumulative sea service. Member should also be aware that a credit or debit to his pay will probably occur due to the change in his/her PBD, ADBD, or cumulative sea service. **Note:** Unit should ensure member understands and agrees with SOCS/SOCSS and then notify PERSRU by deadline date contained in the letter.

Personnel Data Information File (PDIF)

Introduction

The Personnel Data Information File (PDIF) is a summary of personnel data from the HRSIC Personnel Data Record (PDR). The HRSIC PDR is an electronic record of personnel and pay data on the member.

When will units receive a PDIF

Units can expect a PDIF to be provided by the PERSRU at the following times:

- Within 5 working days after a member reports in PCS
- Quarterly in January, April, July and October
- Upon the request of the unit

Note: If you are not receiving the PDIFs for all of your members assigned to your unit, then contact the PERSRU and ask them why you are not receiving them. The PERSRU has the ability to either send the PDIFs via E-mail or by printing them off and sending them to you.

Block by block description

Explanation of the information on the PDIF is contained in Enclosure (5) of this manual.

Personnel Data Extract (PDE)

Introduction

The Personnel Data Extract (PDE), CG-4902, is periodically produced by PMIS/JUMMPS and provides important personnel database information.

The PDE

The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle.

Upon receipt

Follow these rules upon receipt of a PDE.

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the PERSRU with necessary supporting documents

Note: Responsibility for verification of PDE information rests solely with the member through the assistance of the command.

Security Clearances

Introduction

This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.

Reference

Personnel Security Program Manual, COMDTINST M5520.12 (series), Section 2.1, Administrative Procedures.

Personnel Security Record (CG-5274)

Security Clearance information for Coast Guard military personnel is recorded on the Personnel Security Record (CG-5274).

Preparation and maintenance of the CG-5274

Policies and procedures governing the preparation and maintenance of the CG-5274 can be found in the Personnel Security Program Manual.

Transcript of Sea Service (TOSS)

Introduction

A Transcript of Sea Service (TOSS (CG HRSIC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. The Transcript of Sea Service lists information regarding a member's sea service, including:

- Names of vessels
- Size and tonnage of each vessel
- Dates the member served on each vessel
- Rank at time of departure from each vessel

Note: This document does not serve to verify creditable sea service for pay purposes (refer to 5-C-3 of this section).

How to obtain a Transcript of Sea Service

If a member desires that a Transcript of Sea Service be prepared, the following must occur:

Stage	Who does it	Action to be taken
1	PERSRU	Request TOSS (CG HRSIC 1075) via rapidraft letter or E-mail and forward to HRSIC (SES). **Note:** The request should include the date the member entered the service and a summary of vessels he/she served on.
2	HRSIC (SES)	Issues CG HRSIC-1075 within 30 days of the date HRSIC received the request. The original and a copy are mailed to the PERSRU.
3	PERSRU	Forwards the original TOSS to the member and files the copy in PERSRU PDR.

Section Overview

Introduction

This section provides you with the information needed to understand and perform miscellaneous personnel transactions which are not covered in any other section of this manual.

In this section

Leave Authorization (CG-2519)

Reference

CG Personnel Manual, Section 7-A, Leave

CG-2519 usage

The Leave Authorization (CG-2519) is used to authorize:

- Regular, sick or emergency leave

  Note: The CG-2519 is only required for sick leave in excess of 2 days.

- Compensatory absence in connection with leave

Do NOT use the CG-2519 for Compensatory Absence in conjunction with TAD/PCS orders

The Leave Authorization (CG-2519) **must** not be used for compensatory absence (CA) in the following instances:

- Periods of CA which are associated with PCS
- Periods of CA in conjunction with TAD orders
- CA, unless such absence is granted consecutively with leave

Continued on next page

Leave Authorization (CG-2519), Continued

Preparation of the CG-2519

The CG-2519 can be typed, prepared using Forms Menu, or handwritten.

Items 1-7 are completed prior to departing.

The space below item 8 is used to indicate if the member used more than one type of absence. Only units outside CONUS need to list regular leave outside CONUS (AO) and regular leave inside CONUS (AI). List types and inclusive date in chronological order.

Follow these procedures for completing the CG-2519.

Item	Description
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's SSN.
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the number of days of authorized absence.
7	DEPARTURE: Enter the time and date absence begins. **Note**: This entry would normally be the time and date normal liberty begins (a day of duty) and the day before the actual first day of leave/absence.
	RETURN: Enter the time and date the absence expires. **Note**: This entry would normally be the time and date the member is expected to be back at the work site/unit (a day of duty) and is the first day after the last day of leave/absence.
	AUTHORIZED OFFICIAL: Sign and date.
8	CHANGE ENDORSEMENT Pen and ink changes to item 7 are NOT allowed. Enter leave date and times if different from those authorized.

Disposition

Forward parts 1 and 2 to the PERSRU upon member's return from leave. If part 2 was given to the member (e.g., for AMC flight) forward only part 1.

Leave Carried over in Excess of 60 Days

Introduction

Members may be authorized to carry more than sixty (60) days leave into a new fiscal year, if the provisions of Article 7.A.15 of the PERSMAN are met.

Reference

Personnel Manual, COMDTINT M1000.6 (series), Article 7.A.15

Procedures for carrying over of more than 60 days for a member

If a member believes that he/she is qualified to carry over more than 60 days of leave into a fiscal year, then the following steps must occur:

Step	Who does it	Action taken
1	MEMBER	Must submit a letter via the chain of command to HRSIC (MAS) and the letter must contain: • a description of the reason the member was prevented from using leave. • an estimate of the total number of days to be carried into the new fiscal year.
2	UNIT	Endorse the letter and send to HRSIC (MAS).
3	HRSIC (MAS)	Will accumulate all requests and will process them immediately following the December end-of-month compute. **Note:** This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

A new request must be submitted by the member if he/she becomes qualified again for additional days to be carried over.

Continued on next page

Leave Carried over in Excess of 60 Days, Continued

Procedures for carrying over of more than 60 days for multiple members at a unit

If multiple members of a unit are qualified to carry over more than 60 days of leave into a fiscal year, then the unit must:

Step	Who does it	Action taken
1	UNIT	Must submit a letter to HRSIC (MAS) and the letter must contain: • a listing of each entitled member of the unit. • an estimate of the total number of days to be carried into the new fiscal year for each member. • and the qualifying circumstances (deployed for Operation XXX, back to back ALPATS, etc..).
2	HRSIC (MAS)	Will accumulate all requests and will process them immediately following the December end-of-month compute. **Note:** This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

A new request must be submitted by the unit if a multiple number of members assigned to the unit become qualified again for additional days to be carried over.

Members have 3 years to use carried over leave

Members have 3 years to use any excess leave carried forward. Any such leave will automatically be carried forward until used, or until the three year "window" has closed. The carry-over balance will not be reduced until all of the regular leave accrued for the year has been used. For example:

> A member is authorized to carry forward 65.0 days on 1 October 1996 (5 days out of the 65 days is excess leave carried forward). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member's excess leave carry forward balance from the prior year to 3.0 days (the 2.0 days over 30.0 coming off the carry over). On 1 October 1997, PMIS/JUMPS will automatically carry 63.0 days forward (30 days accrued for fiscal year 1997 **plus** 33 days carried over from the prior year **equals** 63 days), since the 3 year window is still open.

Preparation of the DD Form 2 CG and DD Form 2

Introduction

Armed Forces Identification Card DD Form 2 CG and DD Form 2 are used as a means of identifying members on active duty, in the reserve, or in a military retired status. The card will be prepared using data contained on the DD Form 1172.

Use of "RAPIDS" facilities is mandatory for ID Card issuance

On 1 November 1996 the issuance of ID Cards through the Real-Time Automated Personnel identification Card System (RAPIDS) became mandatory. Manual preparation of ID cards is prohibited except in the following circumstances:

- Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available.
- Transition Assistance Management Program (TAMP) beneficiaries and foreign students may be issued DD Form 1173.
- HRSIC (RAS) may issue DD Form 1173-1.

Availability of RAPIDS facilities

The seven uniformed services have signed a cross-servicing agreement to provide ID card support to all eligible beneficiaries, regardless of their parent service. Once an ID card issuing facility is designated a RAPIDS site, service will be available to any eligible beneficiary.

RAPIDS sites have been established within reasonable distances of most units. Most Coast Guard District, ISC, and Group Offices are designated RAPIDS sites. Most large Department of Defense commands, active and reserve, are designated RAPIDS sites.

Coast Guard units unable to determine their supporting RAPIDS site should contact COMDT (G-WPM-2) for assistance.

Reference

CG Personnel Manual, Section 13-E, Identification Cards and Tags.

Continued on next page

Preparation of the DD Form 2 CG and DD Form 2 , Continued

Preparation

Prepare the DD Form 2 CG (Active), DD Form 2 CG (Reserve) and DD Form 2 using a typewriter or the RAPIDS computer equipment. All dates will be in YYYYMMMDD format. Most entries on the card are self-explanatory, there are a few exceptions:

Block	**Description**
Grade	• For pay grades E-1 to E-3, enter NON PETTY OFFICER. • For pay grades E-4, E-5 or E-6, enter PO3 (E-4), PO2 (E-5), or PO1 (E-6). • For pay grades E-7, E-8 or E-9, enter CPO (E-7), SCPO (E-8), or MCPO (E-9). • For pay grades CWO2 to CWO4 enter CWO (W-2), (W-3), (W-4), as appropriate. • For pay grades O-1 to O-10, enter ENS (O-1), LTJG (O-2), as appropriate. • For Cadets enter CDT. **Note:** Reserve members retired without pay - enter the abbreviation "RET" after member's grade on DD Form 2 CG (Reserve).
Expiration Date	• Active duty enlisted, enter expiration of enlistment . • Cadets, enter expected date of graduation. • Reservist on active duty, enter expiration of active duty. • Reserve enlisted, enter expiration of reserve enlistment. • Reserve member retired without pay, enter 60th birthday. • Officers, enter INDEFINITE. • All Retired members, enter INDEFINITE. • TDRL, see appendix B page 3-2-1.
Signature	Type the full name below the line, member signs in black or blue ink above typed name.

Continued on next page

Preparation of the DD Form 2 CG and DD Form 2 , Continued

Preparation (continued)

Block	Description
Social Security No.	Enter 9 digit SSN in format 000000000.
Blood Type	Enter the member's blood type (e.g., B-, O+).
Geneva Convention	See Enclosure (8) of this manual and enter I, II, etc. as appropriate.
Date of Issue	Enter the date of signature by the issuing officer.
Signature of Issuing Officer	**Manual ID cards Only**enter first name or initial, middle initial, last name, rate/rank, and branch of military service. Signature must be in black or blue ink.
Medical for DD Form 2 (Retired)	See page 16 of Appendix (B) to this manual (paragraph 3.a.(3)).

Photograph (for manually prepared ID cards only)

The size of the photo should be approximately 1 inch by 1 inch. The portrait will have the member's full face and consist of the largest image that will include the member's head and information on a title board before a neutral background. The portrait can be black and white or color. The member will be uncovered. An information board is required for members on active duty who are issued a manually prepared ID card. The information board will contain the following information about the member, each on a separate line below each other.

- Last name
- First name and middle initial
- Social security number

Lamination

Use only polyester, polyethylene coated plastic film, preferably .010 mil. in thickness and thermoplastic laminating equipment.

Personal Clothing and Equipment Record (AF Form 538)

Introduction

The purpose of the Personal Clothing and Equipment Record is to record protective clothing and equipment that has been issued to personnel.

Usage

Unit COs must ensure that all members under their command who have been issued equipment have an up-to-date AF Form 538. It must be used to record:

- Issue date
- Inspection dates
- Modifications and repairs

Preparation

The form should be maintained by the individual responsible for issuing, monitoring, and accounting for issued items.

Block	Description
National Stock Number and Article	Enter the national stock number (NSN) on the top half of the block and the description of the article on the lower half.
Authorized Allowance	ASC Enter the quantity of the item authorized for issue as listed in COMDTINST M10470.10.
	QNTY Enter the actual quantity of the article issued.
Size	Enter the size of the article.
Issue Date	Enter the date the article was issued. For returnable items enter an R in the number block and an N for non-returnable.
Turn in Date	Enter the date the article was turned in for repairs, modification, or due to transfer. Enter an R in the numbered block corresponding to the turn in date of the article. For non-returnable items, enter NONRETURNABLE across the numbered block.
Balance on Hand	Leave blank.

Continued on next page

Personal Clothing and Equipment Record (AF Form 538) ,
Continued

Preparation
(continued)

Block	Description
1 thru 19	Enter the articles following the above instructions
20	Leave blank
21	Leave blank
22	Enter present unit
23	Enter the grade/rate or the member
24	Enter member's SSN
25	Enter the member's work phone number
26	Enter the member's last name, first name, and MI
Signature of Individual	Have the member sign in the block which corresponds to the article(s) issue date
Signature of Sup Rep	Have the supply representative sign in the block which corresponds to the article(s) turned in
Page	Enter the consecutive page number
27	Date and signature will be entered by the individual performing the inventory
28	Leave blank
Validation	Leave blank
Remarks	Use for any explanatory information

Reporting Change in Mailing Address

Introduction

A member's mailing address is shown in block 22 of their LES. This address should be the member's home address and not the unit address. The member's mailing address is used for several purposes, including mailing IRS Form W-2 annually for all personnel, and LESs for reservists as well as members assigned to detached OPFACs.

Member's responsibility

The member must notify the unit whenever there is a change in their mailing address. Complete one of the following when a change occurs:

- W-4 Form
- BAH/Housing Worksheet
- Pen and ink change to a copy of the LES
- Reserve Information Worksheet, CG HRSIC-2055 (from Enclosure (1) to this manual)

Pen and ink change to the LES

Make the following pen and ink change to a copy of the LES when changing your mailing address.

Step	Action
1	Line out the old address.
2	Enter the new address in the same block.
3	Sign and date beside the new address.
4	Make a copy for your files.

Disposition

Forward whichever form used to the PERSRU.

Employment Verification

Introduction

Requests for employment verification from outside the Coast Guard should be completed at the unit if they have the information requested; if not, forward to the PERSRU.

Reference

Privacy and Freedom of Information Act Manual, Enclosure (7).

Procedure

All requests for employment verification will be completed as follows:

IF the information is	THEN
not Privacy Act sensitive,	complete the request.
Privacy Act sensitive,	complete the request, attach a signed statement by the member authorizing release of the information and make the appropriate entry on the Disclosure Log.

Assignment Data Form (CG-3698A)

Introduction

The Assignment Data Form is necessary to provide up-to-date information to personnel assignment officers regarding an active duty member's personal status and assignment preferences.

Reservists may request reassignment by completing a CG HRSIC-2055, Reserve Information Worksheet, from Enclosure (1) to this manual. Forward the completed form to the appropriate ISC (fot) via the Commanding Officer.

References

- CG Personnel Manual
  - Articles 4-C.2.a through 4-C-2.f
- Commissioned and Warrant Officer Billet Manual
  - Section A, Officer Billet Code System
  - Section B, Occupational Field Codes
  - Section C, Organizational Level Codes
  - Section D, Job Position Locator Codes
- Enlisted Billet Manual, Chapter 5, Tables of General OPFAC Codes & Geographic Areas.

Submission of the CG-3698A

The Assignment Data must be submitted by active duty personnel as follows:

- Within 6 months of reporting to a new unit.
- To request a specific duty assignment.
- To request a tour extension at current PDS.
- To request mutual or unilateral transfer.
- 6 to 9 months prior to a member's discharge or RELAD date.
- During the "Engage" phase of the S.P.E.A.R. assignment process, for members who will be tour complete in the upcoming fiscal year.

Preparation and distribution

Detailed instructions for the preparation and distribution can be found on the reverse of the CG-3698A.

Assignment/Termination of Government Quarters

Introduction

When a member moves into or out of government quarters, it normally results in a change in BAH entitlements. This job aid will assist you in notifying the PERSRU to avoid over/under payments.

The need for prompt PERSU notification

Timely input of pay transactions is critical. This is especially true when a pay transaction has a large dollar impact on the member, such as a transaction connected with government quarters occupancy or termination.

- Providing timely notification (within 48 hours) of a change to a member's housing status will enable the PERSRU to input the required PMIS/JUMPS transactions and ensure the member receives the correct amount of pay.

In any typical month there are over $40,000 in overpayments to Coast Guard members assigned to government quarters. Although some of the overpayments are caused by normal processing delays (e. g., time between PERSRU input and the time the next PMIS/JUMPS update is run), a large majority can be directly attributed to the unit's or the housing officer's failure to notify the member's PERSRU in a timely fashion.

References

CG Housing Manual,
Section 6-E, Assignment to Public Quarters and Rental Housing
Section 6-F, Termination of Assignment: Public Quarters and Rental Housing

Advance notification will avoid incorrect payments

Members anticipating assignment to government quarters may submit a special request to the PERSRU to have the BAH stopped ahead of time to avoid being overpaid.

A member desiring to live on the economy must request permission from their commanding officer to be eligible for BAH entitlements.

Continued on next page

Assignment/Termination of Government Quarters, Continued

Notifying the PERSRU

PERSRUs, housing offices and unit administrative staffs must work together to develop local procedures for PERSRU notification. Proper documentation is always required. However, PERSRUs may accept, at their discretion, telephone notification of housing status changes as long it will be followed up with "hard copy" documentation with 48 hours.

In the absence of an agreement between housing officials and the servicing PERSRU, follow these procedures upon notification that a member has been assigned or terminated quarters:

Step	Action
1	Local Housing Officer, Unit administrative staff, or the member notifies the servicing PERSRU within 48 hours by E-mail or most efficient means. • Provide copy of notification to Area Housing Officer.
2	Ensure notification includes: • Rate/Rank • Name & SSN • Date of assignment/termination • Indicate if spouse is in service • Indicate type of quarters • If inadequate quarters indicate the rental fee
3	Upon receipt of the notification, the PERSRU will submit the appropriate PMIS/JUMPS transactions

Permissive Travel Authorization

Introduction

A Permissive travel authorization must be prepared in Basic Coast Guard Letter format. Use of the CG-2519, CG-4251, CG-5131, or authenticated message is not authorized.

Reference

CG Personnel Manual, COMDTINST M1000.6 (series), Article 7-A-10

Preparing a Permissive Travel Authorization

A Permissive travel authorization must contain the following:

- Reason for the travel authorization
- Location and inclusive date the member will be absent
- This non-cost statement from the PERSMAN

"This authorization is issued with the understanding that you will not be entitled to reimbursement for mileage or expense in connection therewith. In case you do not desire to bear this expense, consider this authorization cancelled."

- The member's signature acknowledging understanding of the non-cost statement

Distribution

The unit must give the original travel authorization to the member. Upon return, the member must endorse the travel authorization with the time/date of departure and return. After return and endorsement by member, the original travel authorization must be forwarded to the PERSRU to complete personnel transactions to credit/debit subsistence entitlements.

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator

Introduction

Changes in official Coast Guard records must be made only after an administrative examination has been made of the documentation presented, and approval is obtained from HRSIC (MAS).

Reference

COMDTINST M1080.10 (series), Military Personnel Records Data (PDR) System

Change of surname due to marriage or divorce

A change of surname due to marriage or divorce must be reported by letter to HRSIC (MAS) and supported by one of the following documents:

- Copy of marriage certificate.
- Copy of final divorce decree containing provisions for restoration of maiden name.

Note: The letter must be submitted and signed by the member, then endorsed by the command.

Change of name for other reasons or correction of date of birth

A request for change of name for any reason other than marriage or divorce (see above) or a request for correction of date of birth must be submitted to HRSIC (MAS); and supported by whichever of the following documents is applicable:

- Copy of court order authorizing name change
- Naturalization certificate authorizing name change
- Birth certificate registered before first enlistment, if not available, provide one of the following:
  - Original or Photostat copy from Fa mily Bible, notarized
  - Baptismal certificate
  - Original or certified copies of school records
  - Census records
  - Birth certificate registered subsequent to first enlistment
  - Corrected birth certificate with supporting evidence
  - Affidavits from officials of business concerns such as banking houses or insurance companies that the individual has in the past carried on business under the desired name.

Continued on next page

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator, Continued

Effective date of name change

Changes in name are effective on the date of approval by HRSIC (MAS).

- If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents.

Change of SSN

A change of the social security number in the official records will be made only when authorized by HRSIC (MAS). A request for a change will be forwarded to HRSIC (MAS). A Photostat copy of the social security card must be enclosed with the request.

- If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents.

Change to Minority Designator

To change a minority designator, members must submit their request via letter stating the reasons for the change. The letter request should be submitted to HRSIC (MAS) via the commanding officer.

- If the request is approved, HRSIC (MAS) will send a copy of the letter of authorization to CGPC (adm-3) and the PERSRU. HRSIC (MAS) will enter changes directly into PMIS/JUMPS, the PERSRU will make pen & ink changes to the member's PDR and other official documents

TRICARE Selected Reserve Dental Program

Introduction

The TRICARE Selected Reserve Dental Program (TSRDP) is an optional government sponsored insurance plan for eligible reserve members. Family members are not eligible. Enrollment in the plan is not automatic, but requires positive enrollment between the reserve member and the contractor.

This program will be administered by the TRICARE Support Office with dental care provided through a civilian contractor, Humana Military Health Care Services, INC

Selected Reserve members who wish to enroll may call the contractor at 1-800-211-3614.

TSRDP Premiums

There is only one premium rate and it is for selected reserve members only.

Enrollment Requirements

Enrollment into TSRDP is voluntary and is subject to the reserve member being enrolled in DEERS. The reserve must remain enrolled into TSRDP for a minimum of twelve months or be subject to a lockout period of twelve months. The only exception to the twelve month requirement is if the selected reserve member is called to active duty for greater than 30 days. The twelve month minimum will not start over for members called to active duty.

Note: The contractor will handle all enrollments (no action is necessary by the PERSRU). The contractor will collect 4 months of premiums at the time of enrollment. The advance premiums provide a cushion to be used during the period of enrollment due to the lag time involved with collecting enrollee premiums.

Disenrollment requirement

The reserve member may disenroll from TSRDP only after being enrolled for a period of twelve months. After the initial twelve month lock-in period or if enrollee is called to active duty, any unused premiums will be returned to the enrollee upon disenrollment.

Note: Disenrollments are between the reserve member and the contractor.

Continued on next page

TRICARE Selected Reserve Dental Program, Continued

Collection of premiums

The following rules apply:

- The monthly deduction for TSRDP will be withheld from the reserve member's pay if the reserve member receives pay during the month.
- If the reserve member did not receive sufficient pay during the month, the contractor will collect the premium directly from the reserve member.

Note: Failure to make monthly renewel premium payments after being billed by the contractor for months when the reserve member did not receive pay will result in the reservists being disenrolled from the TSRDP and subject to a lock-out period of twelve months.

Termination of TSRDP

TSRDP is terminated on the last day of the month in which the SELRES member is discharged, transferred to the Individual Ready Reserve (IRR), Standby Reserve, Retired Reserve, or SELRES ordered to active duty for a period of more than 30 days.

Effective date of coverage

Coverage usually begins on the first day of the following month of initial enrollment.

Section Overview

Introduction

This section explains the types of payments available to Coast Guard members and the procedures to request special payments, advances and death gratuity.

In this section

Regular Payments

Introduction

A regular payment is a payment made by PMIS/JUMPS based on the member's pay account. It is delivered based on the member's payment option election.

Pay periods

Each month is divided into two pay periods. Approximately 10 days before the end of each pay period, HRSIC computes the payroll based on PMIS/JUMPS transactions input by PERSRUs.

Description

A regular payment covers the amount of pay and allowances accruing to an account during a semimonthly pay period. This payment also includes routine adjustments to previous pay periods.

Special Payments

Background

In addition to making regular semimonthly payments, HRSIC has the authority and ability to make certain special payments through the Department of Treasury. Special payments can be authorized in two instances:

Nonreceipt of pay - Member did not receive his/her regular semimonthly payment, or received it but is was lost or stolen.

Significant pay shortage- Member's regular semimonthly payment was significantly less than it should have been, and the member will experience a hardship if he/she must wait unit a subsequent semimonthly payment to receive the pay due.

Criteria for special payments due to nonreceipt of pay

A member may be authorized a special payment if:

- Member is on direct deposit, and the member has verified with his/her financial institution that his/her semi-monthly payment has not been received by the financial institution: or
- Member is not on direct deposit, and the member's semi -monthly check either:
  - Has not arrived within 5 working days after scheduled payday; or
  - Was received by the member, but was lost or stolen before the member could negotiate it.

Note: A member will not be authorized a special payment for any type of bonuses (SRB, Enlistment Bonus, SELRES Bonus).

Continued on next page

Special Payments, Continued

Criteria for special payments due to regular semimonthly payment being significantly less than it should have been

A member may be authorized a special payment if he or she meets **all** of the following 5 criteria:

(1) The member is underpaid $150.00 or more in his/her regular semimonthly payment; **and**

(2) The pay shortage amounts to 10% or more of the member's total pay entitlements; **and**

(3) The member is not scheduled to receive the reimbursement of the pay shortage in the next scheduled payday; **and**

(4) The pay shortage is causing the member to experience a financial hardship; **and**

(5) The PERSRU has submitted documentation certifying the member's entitlement to the additional pay due.

Nonreceipt of pay procedures

Follow these procedures for claiming nonreceipt of a pay.

When member's pay delivery is	Then the ...	Does this...
Direct Deposit	Member	Completes Nonreceipt Worksheet, CG HRSIC-2050 (see Enclosure (1) of this manual) and submits to unit admin.
	Unit	Notifies and forwards worksheet to PERSRU.
	PERSRU	Verifies information and notifies HRSIC (MAS).
	HRSIC (MAS)	Makes special payment via EFT.

Continued on next page

Special Payments, Continued

Nonreceipt of pay procedures (continued)

When member's pay delivery is	Then the ...	Does this...
Check to unit or member's home	Member	Completes Nonreceipt Worksheet, CG HRSIC-2050 (see Enclosure (1) of this manual) and submits to unit admin.
	Unit	Notifies and forwards worksheet to PERSRU.
	PERSRU	• Verifies information. • Notifies HRSIC (MAS). • Forwards Nonreceipt Worksheet, signed by the member, to HRSIC (MAS).
	HRSIC (MAS)	Recertifies check and mails to correct address.

Significant pay shortage procedures

Follow these procedures for requesting a special payment in pay shortage cases:

Note: Special payments for IDT pay discrepancies are generally not authorized but may be considered on a case-by-case basis.

When member's pay delivery is	Then the ...	Does this...
significantly less than it should have been	Member	Notifies unit admin office that a special payment is needed to avoid a financial hardship.
	Unit	Notifies PERSRU.
	PERSRU	• Verifies that all pay entitlements transactions have been input into PMIS/JUMPS. • Sends E-Mail to MAS/HRSIC with pertinent information using the format provided in Exhibit 6-B-1.
	HRSIC (MAS)	Makes or authorizes special payment.

PERSRU TO HRSIC (MAS) E-mail FORMAT

SUBJ: REQUEST FOR SPECIAL DIRECT DEPOSIT PAYMENT DUE TO SIGNIFICANT PAY SHORTAGE

A. PERSONNEL AND PAY PROCEDURES MANUAL, HRSICINST M1000.2A, CHAPTER 6

1. RATE/NAME (First MI Last) SSN USCG or USCGR
   (i.e., YNC John C. Doe 000 00 0000, USCG)

2. PLEASE EXPLAIN SPECIFIC REQUEST

NOTE: Example: Request special direct deposit payment of pay and allowances for the period 97AUG01 to 97AUG31. The Depart/Report ADT (R990) transaction was not transmitted in time for polling cutoff for 97SEP15 payday due to an administrative error.

Computation of payment are as follows:

Credit	Period	Monthly/Daily Amount
Basic Pay	97AUG01-97AUG31	$2329.20 (monthly)
BAH With	97AUG01-97AUG31	$ 564.60 (monthly)
BAS	97AUG01-97AUG31	$ 8.30 (daily)

Debit	Period	Monthly/Daily Amount
Taxes	97AUG01-97AUG31	$ 652.17 (monthly)
SGLI	97AUG01-97AUG31	$ 17.00 (monthly)
Payment		$2481.93

Reasons for computation: To ensure the request meets the requirement of reference (a) and to ensure we all have the same understanding of what the amount of the special payment will be.

3. REQUEST MEETS THE CRITERIA OF REFERENCE (A)

4. PLEASE INDICATE SUBMISSION OF PMIS TRANSACTION(S) AND PAT NUMBER AND PAT DATE AND WHETHER FAX COPY(S) SENT OR TRANSACTION(S) CAN BE SEEN IN PMIS/JUMPS

NOTE: Example: R990 submitted on 98-03 PAT 101 dated 97SEP08 and fax copy(s) sent/not sent this date because transactions can/cannot be seen in PMIS/JUMPS. If R990 transmitted, please fax copy to (785) 295-2638, ATTN: Chief, Pay Team, at the same time you send the E-mail request unless the transaction can be seen in PMIS/JUMPS.

5. PERSRU POINT OF CONTACT
   (i.e., YN2 Fred Yeoman (202) 267-0000)

6. SIGNED BY DESIGNATED PAYMENT APPROVING OFFICIAL (PAO)
   (i.e., Signed by YN1 I Amgood)

NOTE: The PMIS/JUMPS signature requirements apply to E-mail requests which are comparable to a pay/personnel transaction or cause funds to be obligated.

EXHIBIT 6-B-1

Advance Payments

Introduction

This information has been provided to aid in determining what type of advances are allowed, when they may be utilized, and how they will be liquidated.

Reference

CG Pay Manual, Section 9-D, Advance Payments.

Rules

Payment of advances must be made through PMIS/JUMPS unless a bona fide emergency exists. Advance Pay may not be paid in cash. Requests for offline payment may be made through HRSIC if payment through PMIS/JUMPS and delivery of the advance in the next PMIS/JUMPS regular payment would create a financial hardship to the member.

Types of advances

Use this table to choose which advance should be taken.

Types	Normally payable when ...
Pay	• transferring to a new permanent duty station (PDS). • serving on a vessel which has a change of homeport. • ordered to active duty (AD) of 140 days or more..
Pay and Allowance	absent over at least one payday, and: • personnel aboard deployed vessels that are not on direct deposit (1-3 paydays). • personnel under PCS orders not on direct deposit.
BAH	authorized for payment of: • advance rent. • security deposits and/or. • initial expenses incident to occupying other than government housing.
OHA, Interim Housing Allowance, and BAH Type II	in conjunction with assignment outside the U.S., is authorized payment of: • advance rent. • security deposits and/or. • initial expenses incident to occupying other than government housing.

Continued on next page

Advance Payments, Continued

Amount payable

Amount requested up to a maximum of three months:
- Advance pay.
- Advance pay and allowances.
- Advance BAH.
- Advance OHA, Interim Housing Allowance, and BA H Type II - amount to be advanced will be determined on the basis of housing expenses and the authorized OHA, interim housing allowance, and BAH Type II.

Process

This is the process for payment of advances:

Step	Who does it	Action taken
1	Member	Submits appropriate worksheet (from enclosure (1) of this manual) to unit • Submits Advances Worksheet, or • Submits PCS Departing Worksheet, if applicable.
2	Unit	Authorizes advance and forwards to PERSRU • In those instances that you must request offline payment, send E-Mail to MAS/HRSIC with pertinent information using the format provided in Exhibit 6-B-2.
3	PERSRU	Completes Advance transactions.

Liquidation

Refer to Paragraph 9-D-4, CG Pay Manual for specific liquidation schedules. The Advances Worksheet (CG HRSIC-2010, from Enclosure (1) of this manual) provides a general description of the liquidation process.

Continued on next page

PERSRU TO HRSIC (MAS) E-mail FORMAT

SUBJ: REQUEST FOR SPECIAL DIRECT DEPOSIT - OFFLINE PAYMENT OF ADVANCE BAH/OHA/PAY (Specify which advance)

A. PERSONNEL AND PAY PROCEDURES MANUAL, HRSICINST M1000.2A, CHAPTER 6

NOTE: Payment of advances must be made through PMIS/JUMPS via H605 transaction unless a bona fide emergency exists. It is preferred that H605 not be submitted if not already done.

1. RATE/NAME (First MI Last) SSN USCG or USCGR
   (i.e., YNC John C. Doe 000 00 0000, USCG)

2. PLEASE EXPLAIN SPECIFIC REQUEST

NOTE: Examples (1) Request offline payment of Advance BAH with dependents in the amount of $1860.00 to be liquidated over a period of 12 months. Payment through PMIS/JUMPS and delivery of the advance in the next PMIS/JUMPS regular payment would create a financial hardship to the member. (2) Request offline payment of Advance Pay in the amount of $3000.00 to be liquidated over a period of 12 months. Payment through PMIS/JUMPS and delivery of the advance in the next PMIS/JUMPS regular payment would create a financial hardship to the member. Member is scheduled to depart PCS on 97SEP04 and payment through PMIS/JUMPS would not be available until 97SEP15 payday.

3. PLEASE INDICATE SUBMISSION OF H605 AND PAT NUMBER AND PAT DATE AND WHETHER FAX COPY SENT OR H605 WILL NOT BE SUBMITTED

NOTE: Example: H605 submitted on 98-03 PAT 101 dated 97SEP08 and fax copy(s) sent/not sent this date because transaction can/cannot be seen in PMIS/JUMPS or H605 will not be transmitted by this PERSRU (please specify which applies). If H605 transmitted, please fax copy to (785) 295-2638, ATTN: Chief, Pay Team, at the same time you send the E-mail request unless the transaction can be seen in PMIS/JUMPS and indicate which situation applies.

4. PERSRU POINT OF CONTACT
   (i.e., YN2 Fred Yeoman (202) 267-0000)

5. SIGNED BY DESIGNATED PAYMENT APPROVING OFFICIAL (PAO)
   (i.e., Signed by YN1 I Amgood)

NOTE: The PMIS/JUMPS signature requirements apply to E-mail requests which are comparable to a pay/personnel transaction or cause funds to be obligated.

EXHIBIT 6-B-2

Advance Payments, Continued

Changes to liquidation schedules

Use this table to determine action needed to change liquidation schedule.

When member	Then
requests increase,	monthly amount is increased.
member requests decrease and liquidation period for advance pay will not exceed 24 months. Note: Applicable to liquidation of advance pay only. The liquidation period for advance BAH/OHA is limited to 12 months.	decrease may be authorized by unit commanding officer.
member requests decrease for liquidation of advance OHA, Interim Housing Allowance, and BAH Type II in conjunction with Overseas Assignment	decrease may be authorized by unit commanding officer.
member is separated during liquidation schedule,	ensure a lump sum payment is effected.
member did not use advance for its intended purpose,	ensure a lump sum payment is effected.

Changes in the monthly installment amount being deducted are made by the servicing PERSRU.

Death Gratuity Payments

Introduction

Death gratuity is payable to eligible survivors of Coast Guard members who die while on active duty. The maximum amount payable is $6,000.

Retired or former Coast Guard members who die within 120 days following the date of separation from active duty, are entitled to the death gratuity payment if the Administrator of Veterans Affairs determines that death resulted from disease or injury incurred or aggravated while on duty or in an authorized travel status. It is the responsibility of the beneficiary to obtain VA certification. After applying, the VA Certification process can take 3-4 months.

Note: VA Certification is also required for a member who is placed on the Temporary Disability Retirement List at the time of death or because death was imminent.

References

CG Personnel Manual, Article 18-A-4, Death Gratuity
CG Pay Manual, Section 10-K, Death Gratuity

Rules

All death gratuity payments will be made by HRSIC (SES).

Procedures

This procedure describes the steps for payment of death gratuities to the beneficiary(ies):

Step	Who does it	Action taken
1	Beneficiary(ies)	• Completes DD Form 397 and includes their SSN in block 5. **Note 1:** The Casualty Assistance Calls Officer (CACO) will assist the eligible survivor in completing the DD From 397. **Note 2:** If payment via EFT is desired, indicate whether or not payment will be sent to the deceased member's account as listed in PMIS/JUMPS or to another account designated by the beneficiary(ies). If not using the same account as listed in PMIS/JUMPS include one of the following, signed by the beneficiary(ies): • Submits DD Form 397 to HRSIC (SES). **Note:** If a VA Certification is required and has been obtained by the VA (as mentioned in the Introduction above), then attach the VA Certificate to the DD Form 397.
2	HRSIC (SES)	• Sends payment via EFT if needed. • Issues 1099R to beneficiary(ies) (upon payment). • CG HRSIC-2015 (Pay Delivery Worksheet) • FMS Form 2231 (FASTART) • SF-1199 (Direct Deposit Application)

Retired Pay Projection Request

Introduction

The CG HRSIC-1900 form may be used to obtain an estimated projection of your future retired pay. It is a financial planning service offered by HRSIC (RAS) to members with over 15 years service who are considering retirement.

Completing the CG HRSIC-1900

The member should complete the CG HRSIC-1900 in original only. Instructions for completion of the form are on the reverse side of the form. The bottom of the form is for HRSIC (RAS) use. A blank CG HRSIC-1900 can be found in Enclosure (1) of this manual.

Mail the completed form to:

COMMANDING OFFICER (RAS)
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Deployed Unit Money List Message (DUMLM)

Introduction

When a cutter is deployed and cannot receive regular mail deliveries, members **not on direct** deposit will not receive their paychecks. Therefore, these members will be paid in cash from their unit cashier fund. These cash payments must be authorized by HRSIC (MAS) on a Deployed Unit Money List Message (DUMLM).

Description

The DUMLM is a message issued by HRSIC (MAS) to pay members not on direct deposit. It contains the member's social security number, last name, and amount due. There is also a blank space provided for the member to record the amount paid and a space for the member to sign upon receipt of payment.

Requesting a DUMLM

To request a DUMLM, a cutter must meet the following criteria:
- be 270' or larger.
- have a Certifying Officer/Agent Cashier.
- be scheduled to deploy away from home port for 4 or more paydays.

DUMLM process

This is how the DUMLM process works:

Stage	Who does it	What happens
1	Cutter	Notifies HRSIC (MAS) 30 days before deployment.
2	HRSIC (MAS)	Issues DUMLM approximately 3 days before each payday while cutter is deployed.
3	Certifying Officer/Agent Cashier	Makes cash payment on scheduled payday to each member listed on the DUMLM.
4	Cutter	Notifies HRSIC (MAS) by message of any changes to DUMLM.
5	Certifying Officer/Agent Cashier	Reconciles the DUMLM and reports results to HRSIC (MAS).

Continued on next page

Deployed Unit Money List Message (DUMLM), Continued

Unit administrative procedures

This checklist has been provided as a job aid to assist the unit in completing all necessary tasks required for requesting and processing a DUMLM. This job aid is designed to be reproduced locally.

Step	Action	Date
1	Forward request to HRSIC (MAS) at least 30 days before deployment. Request must contain: • departure date of deployment. • scheduled date of return.	
2	Notify HRSIC (MAS) by message 1 day after sailing of: • any unit member not on direct deposit who did not sail with the cutter. • any new members not on direct deposit who recently joined the cutter.	
3	Notify HRSIC (MAS) by message if the DUMLM is not received, or if the total of payments does not equal the sum of the individual payments.	
4	Notify HRSIC (MAS) by message if a deployment is extended beyond the originally scheduled completion date. • This message must be received by HRSIC (MAS) not later than 15 days prior to the original completion date or the cutter will automatically be removed from deployed pay status. • A new message must be sent each time the deployment termination date is extended.	

Continued on next page

Section Overview

Introduction

This section explains the Inactive Duty Training (IDT) pay system, and gives policies, procedures and processes to guide the unit in support of reserve personnel.

In this section

The IDT Process

Introduction

Inactive duty reservists are paid by the PMIS/JUMPS system the same as active reservists, with a few exceptions.

Reference

- Reserve Policy Manual, COMDTINST M1001.28 (series)
- Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

The IDT process

This is how IDT works:

Stage	Who does it	What happens
1	Unit/Drill Site	Issues IDT drill orders monthly or quarterly.
2	Reservist	Performs drill(s) as scheduled.
3	Unit/Drill Site	• Endorses order and forwards to PERSRU. Or.... • Completes Unit Attendance Record (UAR) and mails to PERSRU/ISC. **Note**: At the direction of the ISC (fot) or District (at), source documents for PERSRU use in entering data into the pay system (e.g., UAR or endorsed order) may take any form convenient to the needs of the user and that meets requirements for accountability.
4	PERSRU	Inputs completed Order/UAR into system.

IDT Prerequisites

Introduction

Before crediting a reservist with pay and/or points for IDT drills certain conditions must be met.

Reference

- Reserve Policy Manual, COMDTINST M1001.28 (series)
- Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Drills must be scheduled

To receive pay and/or points, a reservist must not only attend a drill, but must be scheduled to attend the drill. Authorization to credit attendance at drills is documented by the inactive duty drill orders, or copies of Standard Travel Order for Military Personnel (CG-5131) for appropriate duty drills, and documentation of actual attendance at the drill (e.g., sign-in sheets, records of muster, etc.).

Pay Status

Single and multiple drills are normally scheduled IDT drills. A reservist in a pay status, as determined by his/her Training/Pay Category, will receive pay and points. A reservist in a non-pay status will receive points only. The designation of a drill with pay **will not** override the reservist's pay status. Consequently, reservists in a non-pay status will not be paid for single or multiple drills performed.

Appropriate Duty

Appropriate duty (with or without pay) must be authorized by the District Commander (at) or ISC (fot). The authority for issuing appropriate duty orders without pay may be delegated to unit commanding officers. Appropriate duty with pay will override the pay status of the reservist assigned to a drilling unit (not the IRR or ISL), allowing the reservist to receive pay for the appropriate duty.

Drill Orders

Introduction

The inactive duty pay cycle starts with the inactive duty drill orders issued by the commanding officer or appropriate duty orders issued by the district commander or commanding officer.

Reference

- Reserve Policy Manual, COMDTINST M1001.28 (series)
- Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Rules for Drill Orders

Follow these rules for IDT drill orders:

- IDT drill orders shall be issued monthly or quarterly.
- Only those reservists whose names are on inactive duty drill orders, or who have been issued appropriate duty orders (with pay), are authorized to receive pay for periods of inactive duty.
- If a reservist's name is not on the inactive duty drill orders when they are issued, and the reservist is later authorized by the commanding officer to perform duty on the date or dates covered by the orders, a written amendment to the order must be prepared and signed.

Verbal Orders

A reservist may be authorized to attend drills or perform appropriate duty verbally if written authorization cannot be prepared until after the duty has commenced. However, written amendments to the inactive duty drill orders or appropriate duty orders must contain a statement similar to the following: "These orders constitute written confirmation of verbal orders issued by ________________ on ______________."

The Unit Attendance Record, Continued

How to complete the UAR (cont'd)

Item	Enter
Prog Des1/ Prog Des2	Program Designations. The appropriate program designation code, see listing below. **Note:** For a complete definition of these codes, see Enclosure (1) to COMDTINST 5310.3 (series).

Operational	Code	Support	Code	Contingency and Surge Operations	Code
Short Range ATON	AN	Acquisition-General	AQ	Boating Safety	BC
Boating Safety Activities	BA	Public and International Affairs	AB	Defense	DC
Defense Operations	DO	Contingency Preparedness	AC	Law Enforcement	LC
Ice Operations	IO	Research & Development	AD	Environmental	LC
Law Enforcement	LE	Engineering & Logistics	AE	Aids to Navigation	NC
Environmental Protection	ME	Financial Management, Supply and Inventory	AF	Port Safety and Security	PC
Merchant Vessel Inspection and Documentation	MI	Structured Training-General	AT	Search & Rescue	SC
Marine Licensing, Personnel & Causality Investigations	MP	Civil Rights- General	AH	Great Lakes - Summer Stock	GL
Radio Navigation	NR	Security, CMC, Pubs.	AI	Space Program Support	SP
Port Safety and Security	PS	Health Services	AK	Olympic Games Support (1996)	OC
Search & Rescue	SR	Legal-General	AL		
Vessel Traffic Services	VT	Operational Intelligence	AG		
		Personnel Support	AP		
		Safety and Occupational health	AS		
		Command, Control and Communications	AW		

Continued on next page

The Unit Attendance Record, Continued

How to complete the UAR (cont'd)

Item	Enter	
ML CD	Used to authorize payment of Commuted Rations (COMRATS) for enlisted reserve members when meals were not available to the member, either from a government mess or through commercial procurement. Use this table to determine which code to use:	
	If the member is authorized COMRATS for	**Then the code is**
	Breakfast Only	A
	Lunch Only	B
	Supper Only	C
	Breakfast and Lunch	D
	Lunch and Supper	E
	Breakfast, Lunch and Supper	F
	No entitlement	N
Pd Drl	The adjusted total of paid drills, overwriting the pre-printed number.	
Un Ex	The total unexcused absences for the member during the current anniversary year.	

Signature

Follow the rules for Signature of Responsible Officer, Authority to sign, on page 1-7 of this manual.

Attachments

Attach the following supporting documentation to the UAR

- Appropriate Duty orders

If travel allowances	Then send
are authorized,	a certified, endorsed copy of the CG-5131 with the UAR. **Note**: Send original to HRSIC (TVL) with travel claim.
are not authorized,	the original of the CG-5131 with the UAR.

- Letter, signed by the CO, for any drills over 90 days old explaining the reason the drills were not reported in a timely fashion.

Continued on next page

The Unit Attendance Record, Continued

Distribution

Distribute the UAR as follows:

- Original - PERSRU
- Copy - Group
- Copy - Unit

Correction to entries after forwarding to PERSRU

Immediately notify the PERSRU, if there is a need to correct any entry on a UAR which has already been sent to or processed by the PERSRU.

Waiver of Pension/Disability Compensation or Retired Pay

Introduction

Reservists who, by virtue of prior military service, are receiving compensation such as:

- a pension
- a disability compensation
- a disability allowance
- retired pay

are not entitled to receive military pay and allowances for periods of active duty, active duty for training or inactive duty unless they elect a waiver of VA compensation.

References

- CG Pay Manual, Paragraph 12-B-3
- 10 U.S.C. 12316

Form for waiving VA compensation

The Notice of Waiver of VA Compensation or Pension to Receive Military Pay and Allowances (VA Form 21-8951) is used to elect a waiver of VA compensation.

- The VA Form 21-8951 is a onetime waiver of VA compensation and, once completed, remains in effect as long as the reservist is assigned to the ready reserve.

Compensation adjustment

Compensation waived is on the basis of 1 day of compensation for every inactive duty drill and/or for each day of active duty.

- Compensation will be adjusted after the end of each fiscal year.

Continued on next page

Waiver of Pension/Disability Compensation or Retired Pay , Continued

The waiver process

This is how the process for waiving pension/disability compensation or retired pay works.

Stage	Who does it	What happens
1	Dept. of Veterans Affairs (VA)	Mails a VA Form 21-8951 to active reserve members who, at the end of the fiscal year are receiving VA compensation, and do not have a waiver on file
2	Member	Completes VA Form 21-8951 and forwards to local VA office
3	HRSIC	• Verifies the number of drills and active duty periods the member performed • Provides totals to VA
4	VA	Adjusts member's VA compensation

Annual Reserve Retirement Point Statement

Discussion

Annually, each selected reservist is issued an Annual Reserve Retirement Point Statement (CG-4175A). These statements are produced and distributed by HRSIC (CST) monthly. The monthly run produces a CG-4175A for selected reservists whose anniversary month is three months past. For example, in February 1998, HRSIC (CST) issues CG-4175As to all selected reservists whose anniversary month is in November 1997.

Note: HRSIC (CST) will also mail a copy of the CG-4175A to servicing PERSRUs at the same time a copy is sent to the selected reservist. PERSRUs shall review and file the most current year CG-4175A in Section 2 of the PERSRU PDR.

References

Reserve Policy Manual, COMDTINST M1001.28 (series), Section 8.C.10
Military Personnel Data Records (PDR) System, COMDTINST M1080.10D

Discrepancies on the CG-4175A

Instructions on the CG-4175A advise the reservist to verify the entries on the CG-4175A. If an entry is incorrect, the reservist is instructed to identify the discrepancy, and:

If	Then
The discrepancy is in the reservist's current or prior anniversary or if there is an unpaid drill or ADT period.	A report of discrepancy will be submitted by the member and sent to his/her servicing PERSRU. **Note:** The following supporting documentation should be sent with the request: • Endorsed ADT/IDT orders, • CGHQ-4973A, • CG-4175A, • correspondence course completion letters, • Any other supporting documentation

Continued on next page

Annual Reserve Retirement Point Statement, Continued

Discrepancies on the CG-4175A, continued

If an entry is incorrect on the CG-4175A, the reservist is instructed to identify the discrepancy, and:

If	Then
The discrepancy is in an older anniversary year.	A report of discrepancy will be submitted by the member and sent to HRSIC (CST). **Note:** The following supporting documentation should be sent with the request: • Endorsed ADT/IDT orders, • CGHQ-4973A, • CG-4175A, • correspondence course completion letters, • Any other supporting documentation

CG-4175A not received by the member

If the CG-4175A is not received by the member or the member is requesting a copy of the CG-4175A, then the member should request a copy from his/her servicing PERSRU.

CG-4175A not received by the PERSRU

If a copy of the CG-4175A is not available at the PERSRU, then the PERSRU must request a copy from HRSIC (CST). The request can be by E-mail and must contain the following information on the member:

- Name
- SSN
- Current mailing address

Note: If member has moved since retiring or separating, please ensure the member's current address is correct and in the records.

Section Overview

Introduction

This section will guide you through the procedures for payment of Basic Allowance for Subsistence, Family Separation Allowance, Overseas Housing Allowance, and Officer Uniform Allowance.

In this section

Basic Allowance for Subsistence (BAS) - Enlisted

Introduction

This section provides procedures for payment of Pro-Rated or Supplemental Basic Allowance for Subsistence and Separate Rations.

Reference

CG Pay Manual, Section 3-B, Basic Allowance for Subsistence (BAS - Enlisted)

Pro-Rated and Supplemental BAS

This is the procedure utilized for payment of Pro-Rated or Supplemental BAS. Supplemental and Pro-Rated BAS is paid to members who are already receiving subsistence, but are detailed to duty away from the messing facility.

Step	Action
1	Log meals on a DD Form 1475 throughout the month
2	Forward to the PERSRU at the end of the month

Separate Rations (SEPRATS)

When a member is authorized to mess separately, notify the PERSRU in writing to start or stop SEPRATS.

Family Separation Allowance (FSA)

Introduction

This is provided to assist in the process of starting and stopping Family Separation Allowance (FSA).

Reference

CG Pay Manual, Section 3-F, Family Separation Allowance (FSA)

Types of FSA

Family Separation Allowance are broken down into three categories:

- FSA-R For personnel serving in a dependent restricted assignment
- FSA-S For personnel permanently assigned to a ship which deployed in excess of 30 days
- FSA-T For TAD assignments, including TAD to a ship which deployed in excess of 30 days

Eligibility of FSA Entitlement

Members and units should be aware of the rules governing entitlement to FSA. Refer to CG Pay Manual, Section 3 for detailed information on FSA. The member must understand that he/she is not considered "a member with dependents" for FSA entitlement when:

- The sole dependent is placed in an institution for a known period of over 1 year or for an indefinite period which may be expected to exceed 1 year.
- The sole dependent is a spouse legally separated or child(ren) in the legal custody of another person.
- The member's dependent parent does not reside in a home which the member controls, supervises, and maintains for mutual use when circumstances permit (43 Comp Gen 44, 46, and 148).
- For member-married-to-member with no dependents, couple must have resided together immediately before being separated by reason of execution of military orders.

Verification of FSA on the FSA Worksheet

FSA entitlement verification will be completed on the FSA Worksheet (CG HRSIC-2035).

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-R

Use the following procedures if the member becomes entitled to FSA-R:

Step	Action
1	The member must complete a FSA Worksheet when he/she becomes entitled to FSA-R.
2	The unit will endorse the FSA Worksheet and forward to the PERSRU. An E-mail may be sent by the unit to the PERSRU to notify the PERSRU that this entitlement needs to be started on the member (this will allow the PERSRU to start the entitlement on the member in a timely manner). However, the unit must still submit the FSA Worksheet to the PERSRU).
3	Upon Receipt of the FSA Worksheet or E-mail, the PERSRU will submit a FSA transaction on the member to start FSA-R. **Note:** After the FSA transaction has been submitted, the PERSRU will ensure that a FSA Worksheet has been received by the unit, if an E-mail was sent by the unit.

Procedures for FSA-S 60 days or less

For ship deployments of 60 days or less, use the following procedures:

Step	Action
1	The unit must ensure that a FSA Worksheet has been completed by each member that is eligible for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Upon return of the ship to homeport, the unit will notify the PERSRU by message or E-mail with the names and SSNs (last 6 digits) of the members entitled to FSA-S. The start and stop dates of FSA-S must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
3	Upon receipt of the message or E-mail, the PERSRU will submit a single FSA transaction for each member to establish a one time credit of FSA-S.

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-S over 60 days

For ship deployments of over 60 days, use the following procedures:

Step	On the 31st day away from homeport
1	The unit must ensure that a FSA Worksheet has been completed by each member that is eligible for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Unit notifies PERSRU by message of start date and member's names and SSNs (last six digits) who are entitled to FSA-S.
3	Upon receipt of the message, the PERSRU will submit a single FSA transaction for each member to establish a start of FSA-S.
	Upon return to homeport
4	Upon return of the ship to homeport, the unit will notify the PERSRU by message or E-mail with the names and SSNs (last 6 digits) of the members. The date FSA-S ends must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
5	Upon receipt of the message or E-mail, the PERSRU will submit a single FSA transaction for each member to establish a stop of FSA-S.

Procedures for FSA-T 60 days or less

For members who are TAD for 60 days or less, use the following procedures:

Step	Action
1	Upon return to the unit from TAD, the member will complete a FSA Worksheet.
2	The unit will endorse the FSA Worksheet and forward it with a copy of the TAD/TEMDU orders to the PERSRU.
3	Upon Receipt of the FSA Worksheet and copy of TAD/TEMDU orders, the PERSRU will submit a FSA transaction on the member to establish a one time credit of FSA-T. **Note:** PERSRUs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received from HRSIC (TVL).

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-T over 60 days

For members who are TAD for over 60 days, use the following procedures:

Step	On the 31st day away from unit
1	The member must complete a FSA Worksheet.
2	The TAD unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the PERSRU servicing the member.
3	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the PERSRU will submit a single FSA transaction on the member to establish a start of FSA-T.
	Upon return to unit
4	Upon return of TAD, the member will complete a new FSA Worksheet.
5	The unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the PERSRU.
6	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the PERSRU will submit a single FSA transaction on the member to establish a stop of FSA-T. Note: PERSRUs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received by HRSIC (TVL).

FSA-T entitlements for reserves on active duty

Reservists (with dependents) on active duty greater than 30 days, but less than 140 days, who are stationed away from their home drilling unit, and whose dependents do not accompany them to the active duty site, are entitled to FSA-T.

Overseas Housing Allowance (OHA)

Introduction

This is provided to assist in the process of starting Overseas Housing Allowance (OHA) and requesting Move-In Housing Allowance (MIHA). OHA provides members assigned overseas an allowance which is based on the difference between their BAH Type II or Family Separation - Housing (FSH) and total housing costs. MIHA provides a one time payment for move-in costs while stationed in an OHA locale.

Reference

Joint Federal Travel Regulations, Chapter 9
Appendix K, Overseas Housing Allowance
Appendix N, Move-In Housing Allowance

Starting OHA

To start OHA complete the following forms and forward to the PERSRU with a copy of the lease/purchase agreement:

- Sign an Overseas Housing Allowance Briefing Sheet (found in the JFTR, Appendix K)
- Complete a DD Form 2367

Requesting MIHA

MIHA is requested by completing a CG-2556 and forwarding it to the PERSRU. A second payment of MIHA may be paid only after approval from Commandant (G-WPM-2).

Officer Uniform Allowance Claim Worksheet (CG HRSIC-5100)

Introduction

The CG HRSIC-5100 is used to substantiate payment of uniform allowances to Coast Guard regular and reserve officers.

Reference

CG Pay Manual,
Section 3-H, Clothing Allowances for Officers
Section 3-J, Uniform Allowances for reserve Officers

Procedure

A copy of the CG HRSIC-5100 can be found in Enclosure (1) of this manual.

Step	Action
1	Enter officer’s name, rank, and SSN
2	Enter the date officer became entitled to the allowance
3	Place an “X” in the appropriate claim code block
4	Forward to the PERSRU

Section Overview

Introduction

This section provides information needed to change federal tax withholding, apply for advance of federal earned income credit, change state tax withholding, or state of legal residence, and report entitlement to Combat Tax Exclusion. This section will also assist you in requesting a duplicate or corrected W-2 form.

In this section

Federal Income Tax Withholding and Advance EIC

Introduction

Every member is required to file an IRS Form W-4 when a pay account is initially opened. Once the tax withholding is started there are times when it needs to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

Reference

COMDTINST M7220.29 (series), CG Pay Manual:
Section 8-A, Withholding of Federal Income Tax
Section 8-E, Advance Payment of EIC

Federal income tax withholding

To change federal income tax withholding, the member must:

Step	Action
1	Complete IRS Form W-4
2	Forward to PERSRU

Advance of Federal Earned Income Credit (EIC)

To begin receiving or change status for advance EIC, the member must complete a IRS Form W-5 and forward it to the PERSRU.

Additional income considered when determining eligibility for EIC

When military personnel are computing their eligibility for EIC they must include the amounts paid (either in-kind or actual) for BAH Type II, Combat Wages, and a subsistence amount equal to enlisted Separate Rations (applies to both officers and enlisted).

Information about the W-2 Form and how to request a duplicate or corrected W-2 Form

Mailing of IRS Form W-2

IRS Form W-2s are mailed no later than 31 January of each year. To allow for reasonable mailing and forwarding due to address changes, reporting of lost or missing W-2 forms should be after 15 February.

Ensuring Tax Mailing Address is correct

To furnish the member with a timely IRS Form W-2, the member should:

- Take care of address changes promptly (submit a PCS Reporting Worksheet upon reporting to new unit or a BAH/Housing Worksheet to change tax mailing address within 1 week of address change).
- Notify Post Office if late December, so W-2 can be forwarded.
- Ensure all addresses comply with prescribed postal address standards.

Note: Information about mailing addresses:

- To comply with Postal regulations and to receive mailing discounts, addresses contained in PMIS/JUMPS are ran through a monthly postal standard address conversion program.
- The postal data base does not recognize that numerous Coast Guard units may reside at a given address. For instance, in Portsmouth, there are several units located at 4000 Coast Guard Blvd. For single members living in barracks or shipboard berthing, the unit's name may be part of the address.
- To ensure proper delivery, the unit's name must be entered at the BEGINNING of the street information on the Tax Mailing Address transaction and the accurate 9 digit zip code must also be entered.
- If the unit's name is at the end of the street information or as part of the city/town information or the 9 digit zip code was not entered, the unit's name will be deleted by the monthly postal address conversion program.

Example of Good Address: ISC (BEQ) 4000 CG Blvd
Portsmouth, VA 23703-2199

Example of Bad Address: 4000 CG Blvd ISC (BEQ)
Portsmouth, VA 23703-2199

Continued on next page

Information about the W-2 Form and how to request a duplicate or corrected W-2 Form, Continued

For members entering the Coast Guard late in the calendar year

If transactions to access a member into PMIS/JUMPS do not properly process until after the PMIS/JUMPS end month compute December polling cutoff, the member will not receive a W-2 for the year he/she entered the Coast Guard.

For example: A member enlists on 16 December 1997, but was not paid by PMIS/JUMPS until 15 January 1998. The member will not receive a W-2 for 1997. The taxable wages earned by the member during calendar year 1997 will be reported on the member's 1998 IRS Form W-2 (as per IRS regulations).

Taxable wages are reported when paid vice when earned

For example, an E-5 serves aboard a Career Sea Pay eligible vessel from 12 to 16 December 1997, but the member does not receive payment for the Career Sea Pay earned in 1997 until 15 January 1998. Per IRS regulations, the taxable income is reported on the IRS Form W-2 for 1998.

General information regarding the IRS Form W-2

General information regarding each block on the IRS Form W-2 can be found on the reverse of "Copy C for Employee's Records". Below is information concerning blocks 13.Q, 13.T, and 15 of the IRS Form W-2:

Block	Information about the block
13.Q	**Earned Income Credit (EIC):** Pay earned in a combat zone, Basic Allowance for Housing Type II, the value of in-kind quarters and subsistence are all earned income that is not taxed but must be reported as EIC. These amounts are listed in Block 13 under code "Q". Basic guidelines for how to calculate the EIC is as follows: • **<u>EIC contains a subsistence amount equal to enlisted Separate Rations (SEPRATS)</u>** regardless of the subsistence entitlement received during the year or whether the member is an officer or enlisted. For example, an enlisted member stationed aboard a cutter with an established dining facility does not receive SEPRATS. However, the value of in-kind subsistence contained in Block 13Q will contain an amount equal to the daily rate of SEPRATS. For 1997, an enlisted member stationed aboard a cutter for the entire year will receive subsistence in the amount of $7.36 a day (365 X $7.36 = $2,686.40.

Continued on next page

Information about the W-2 Form and how to request a duplicate or corrected W-2 Form, Continued

General information regarding the IRS Form W-2, Continued

Below is information concerning blocks 13.Q, 13.T, and 15 of the IRS Form W-2, continued:

Block	Information about the block
13.Q, cont	• **<u>EIC contains a BAH amount</u>** and is more complicated than the above subsistence calculation. EIC reflects BAH Type II with dependents for the periods the member received: (1) BAH with dependents; (2) Assigned to family type quarters; (3) BAH Type II without dependents and BAH Diff simultaneously and; (4) Assigned to single quarters while receiving BAH Diff, i.e., receiving BAH Diff while assigned to Unaccompanied Leased Housing; (5) BAH Diff. EIC reflects BAH Type II without dependents for the periods the member received: (1) BAH Partial only (no BAH Diff); (2) BAH Type II without dependents (no BAH Diff); (3) Assigned to single quarters and not receiving BAH Diff (i.e., has no dependents and is assigned to Unaccompanied Leased Housing). • **<u>Combat tax exclusion</u>.** For enlisted and warrant officers, all taxable military pay items earned by a member during a month while serving in a combat zone are excluded from federal and state taxation. As a result, these amounts are included in EIC. For officers, only the amount taxable of military pay (which is equal to the current base pay rate for an E-10) is included. **Note:** IRS Publication 3, Armed Forces' Tax Guide and Publication 596, Earned Income Credit, provide information pertaining to and guidance on how to apply for EIC.
13.T	Adoption Assistance Benefits. Qualified adoption expenses paid by the Coast Guard are not subject to federal income tax withholding.

Continued on next page

Information about the W-2 Form and how to request a duplicate or corrected W-2 Form, Continued

General information regarding the IRS Form W-2, Continued

Below is information concerning blocks 13.Q, 13.T, and 15 of the IRS Form W-2, continued:

Block	Information about the block
15	This block affects the deductibility of IRA contributions. If the "Pension Plan" block is checked, it means the amount of your IRA deduction will depend on your tax filing status and your modified adjusted gross income. • For active duty members, IRS regulations require t he "Pension Plan" block be checked. • For reserve members, the "Pension Plan" block will only be checked if the member served on active duty, other than for training, for more than 90 days. If the cumulative active service during the calendar year was less than 91 days, the "Pension Plan" block will not be checked on the reserve member's IRS Form W-2.

How to request a duplicate IRS Form W-2

To receive a duplicate W-2 form for the previous year, the member must:

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td rowspan="4">1</td><td colspan="2">Review address on December LES (Block #22).</td></tr>
<tr><td>If</td><td>Then</td></tr>
<tr><td>correct</td><td>the member's unit submits request (E-mail, FAX, letter, etc.) to HRSIC (SES) after 15 February indicating:
• lost, or didn't receive.
• member's name, and SSN.</td></tr>
<tr><td>incorrect</td><td>• contact old unit/residence and ask them to forward the W-2 form.
• contact PERSRU to update current mailing address.</td></tr>
<tr><td>2</td><td colspan="2">If after 15 February the W-2 has not been located or is lost; the member's unit submits request (E-mail, FAX, letter, etc..) to HRSIC (SES) including:

• member's name and SSN.
• mailing address for duplicate W-2.
• reason why block #22 was not updated with current address and/or indicate "lost".</td></tr>
<tr><td>3</td><td colspan="2">Upon receipt of request, HRSIC (SES) will reissue W-2 within 14 days.</td></tr>
</table>

Continued on next page

Information about the W-2 Form and how to request a duplicate or corrected W-2 Form, Continued

How to request a corrected IRS Form W-2

Follow the procedures below when questioning a figure reported on the IRS Form W-2:

Stage	Who does it	What happens
1	MEMBER	Notifies unit admin office with the following: • Item on W-2 suspected to be in error • What the member thinks is the right amount and why • calculations
2	UNIT	• Review member's calculations and supporting documentation, i.e., LES • If the EIC amount is in dispute, first determine if the member would even qualify for EIC. There is no value added in recalculating EIC, if the member earns too much money and would not qualify for EIC.
3	PERSRU	• Verify calculations provided by member/unit • Notify HRSIC (SES) via E-mail and provide calculations. An example is: **E-mail example:** Suspect EIC reported in Box 13.Q of (RANK/NAME/SSN) IRS Form W-2 for tax year XXXX is incorrect. We calculate the EIC to be $7,556.08 based on the following: $2,686.40 ($7.36 per day for subsistence (1997 rate)) $4,515.20 (BAH Type II with, E4, from 97Jan29 to 97Dec31 @ $408.00 month) $ 354.48 (BAH Type II with, E3, from 97Jan01 to 97Jan28 @ $379.80 month) $7,556.08

Request for Federal or State Tax Adjustments

Request for Federal or State Tax Adjustments

It is the member's responsibility to ensure that his/her federal or state tax information is kept current and up-to-date. If through administrative error (i.e., PERSRU received a tax adjustment request from the member, but failed to act on member's request), a retroactive adjustment may be requested. If there is no administrative error, a retroactive adjustment will not be made.

Example: The state of California permits the member to be exempt from state taxation while on active duty and stationed outside the state. If a member who is stationed in California and is a legal resident of California, transfers PCS to Florida, the member is responsible for ensuring he/she is exempt from state withholding. If the member does not initiate action to change his/her state tax until several months later, the member will not receive the SITW previously withheld. The member will have to collect any overpaid state taxes from the state of California.

If an adjustment needs to be made to the member's FITW or SITW then the member must:

If the member is	Then
Active Duty, Reserve, or NOAA	A request (i.e., RDLTR, E-mail) for an adjustment must be submitted via the servicing PERSRU, with supporting documentation (i.e., DD Form 2058), to HRSIC (SES). **Note:** The request must be received at HRSIC prior to 10 December of the current tax year. Per IRS regulations, requests for refunds of FITW or SITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW or SITW from the IRS or the state.
Retired (or their annuitants)	A request must be submitted to HRSIC (RAS). **Note:** The request must be received at HRSIC prior to 10 November of the current tax year. Per IRS regulations, requests for refunds of FITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW from the IRS.

Continued on next page

Request for Federal or State Tax Adjustments, Continued

IRS Form W-2c

A statement of Corrected Income and Tax Amounts (IRS Form W-2c) is prepared by HRSIC (SES) in cases where it becomes necessary to report corrected tax information. HRSIC (SES) will issue a IRS Form W-2c when the member was qualified for Combat Tax Exclusion for duty in a combat zone.

For example: A member was eligible for Combat Tax Exclusion for the month of October 1997. On 15 February 1998, the member receives the W-2 and becomes aware that the appropriate transactions were not submitted by the PERSRU for tax exclusion. After the appropriate transactions are submitted by the PERSRU through PMIS/JUMPS, HRSIC (SES) will issue the member an IRS Form W-2c to adjust the member's taxable wages and Earned Income Credit (EIC) (blocks 1 and 13C).

Note: Per IRS regulations, since the tax year has ended, HRSIC cannot refund the FITW or SITW that was withheld in October 1997. Since the year has ended and all withholdings have been reported and paid to the IRS and/or applicable state, the member will collect any overpaid FITW or SITW when he/she files a return or an amended return.

For the purpose of making adjustments for prior period W-2s, all tax returns are considered to be filed on 15 April of the year after the close of the tax year, and any adjustments to a W-2 may only be made within 3 years of that date.

Section Overview

Introduction

This section provides you with the procedures for collecting an in-service debt and counseling a member on an overpayment.

Cash deposits

If a member desires to repay part of all of an in-service debt, mail a check, made out to U.S. Coast Guard, to HRSIC (DC) with a copy of the LES or Notice of Overpayment (NOP).

Interest, administrative fees, and penalties

- Interest will be applied to all overpayments that occur earlier than the current PMIS/JUMPS processing period, and on all non-payroll debts to the Coast Guard unless waived by CO, HRSIC. No interest will be applied if debt is paid in full prior to the start of collection action. A 30 day notice will be provided to the member with interest being applied from the date of notification.
- Administrative fees and penalties will be applied on a case by case basis in accordance with 4 C.F.R., and the CG Pay Manual.

In this section

Collection of PMIS/JUMPS Overpayments

Introduction

An overpayment of pay and allowances is the result of errors or delays in processing pay-related transactions. This will assist the unit when counseling a member on an overpayment.

Reference

COMDTINST M7220.29 (series), CG Pay Manual, Chapter 11, In-Service Debt Collection

How a member is notified of an overpayment

A Notice of Overpayment (NOP) letter will be provided by HRSIC (MAS) for each member with a debt of $751 or more. Member's with debts of $750 or less will be notified by a message on the LES.

Action upon receipt of a Notice of Overpayment letter

Upon receipt of a Notice of Overpayment (NOP) letter the member's commanding officer shall:

- provide a copy of the NOP letter to the member.
- counsel the member regarding the debt and the collection procedure.

Continued on next page

Collection of PMIS/JUMPS Overpayments, Continued

Overpayment collection process

Use this table when counseling the member on overpayment collection procedures.

Note: The standard procedures described below do not apply if the time remaining before the member's scheduled date of separation is not sufficient to complete collection. Every effort will be made to collect debts prior to separation.

If overpayment is	Then collection will be
less than $150	taken during current month if sufficient net pay exists, with a remark on the LES **Note**: If sufficient net pay does not exist, then the member will be advanced the overpayment amount and collection will start the next month
$150 to $750	scheduled for automatic repayment at a rate not to exceed $150 a month starting the next month with a remark on the LES
$751 to $1999	scheduled in 5 equal monthly installments 30 days after unit CO receives written notice of member's debt
$2000 or greater	scheduled as 1/3 available pay or $400 per month whichever is greater unless: • 1/3 available pay makes repayment less than 5 months, collection will be set at 5 months • repayment exceeds 12 months then repayment rate will be 1/12 of debt, provided it doesn't exceed available pay • 12 equal installments exceed available pay, then repayment will be amount of available pay

Requesting a different repayment schedule

The member's commanding officer may propose a different repayment schedule based upon the member's financial status, as long as repayment is completed prior to separation. Repayment of less than 10% of available pay, or longer than one year will only be approved in cases of legitimate financial hardship. If a financial hardship exists, a Financial Statement, CG-5489B, (from Enclosure (1) to this manual) must be completed and forwarded to HRSIC (MAS) for review and approval.

Collection of Other Debts

Introduction

There are several types of debts that a member may incur that can be collected directly from their pay.

Reference

COMDTINST M7220.29 (series), CG Pay Manual, Chapter 11, In-Service Debt Collection

Types of debts

This table lists several types of debts which can be collected from a member's pay.

Type	Who does it	Action taken
Unliquidated Travel Advance	HRSIC (TVL)	Issues dunning letter to member
	FINCEN	Initiates collection (Active duty members)
	HRSIC (DC)	Initiates collection (Reserve members)
IRS Tax Levy	Unit	• Forwards notice of levy to HRSIC (MAS) • Notifies originating IRS unit that notice of levy has been forwarded
	HRSIC (MAS)	Initiates collection
Garnishment Involuntary Allotment	Unit	Upon receipt of a court order for garnishment returns order to sender with a letter informing them that the order must be sent directly to HRSIC (LGL) for action
	HRSIC (LGL)	Prior to starting an involuntary allotment, HRSIC (LGL) will forward documentation to both the member and the member's commanding officer, notifying them that automatic processing will occur if a response is not received within 90 days from the date HRSIC mailed the documentation. Specific procedures to be followed by the member and the command will be included with the documentation provided by HRSIC.
Private Damages	Unit	Submits the report of investigation to HRSIC (DC)
	HRSIC (DC)	Initiates collection

Continued on next page

Section Overview

Introduction

This section will guide you through the procedures following NJP or courts-martial proceedings, reporting a member UA or a deserter, and reporting a member who has returned after being absent or declared a deserter.

In this section

Nonjudicial Punishment (NJP) Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/PERSRU in completing all necessary tasks required after NJP proceedings. This job aid is designed to be reproduced locally.

Reference

Military Justice Manual, Article 1-F-3, Personnel Record Entries

NJP checklist

Follow these procedures after NJP proceedings.

Step	Action	Reference	Date
1	Forward to the PERSRU the CG-4910 and the Acknowledgment of Rights Acceptance of NJP	MJM	
2	Complete special performance evaluation and required CG-3307 entries and forward to HRSIC (ADV) **Note:** Copy of the CG-3307s must be sent to the PERSRU.	10-B-2 PERSMAN PG-7 Instruction	
3	File a copy of CG-4910 and Acknowledgment of Rights Acceptance of NJP in the unit punishment book, replace with original when returned from the PERSRU	1-F-3 MJM	
4	Initiate report to COMDT (W-KS-5). Refer to Section 2-T of the Personnel Security Program, COMDTINST M5520.12 for detailed information.	2-T PERSEC	

Courts-Martial Checklists

Introduction

These checklists have been provided as a job aid to assist the unit/PERSRU in completing all necessary tasks required after a courts-martial. This job aid is designed to be reproduced locally.

Reference

Military Justice Manual,
Section 5-G, Courts-Martial Action and Review
Section 5-E, Suspension of Sentence

Summary courts-martial

Follow these procedures after the convening authority has acted on a summary courts-martial where the member was found guilty.

Step	Action	Reference	Date
1	Forward to the PERSRU • Copy of DD-Form 2329 • Acknowledgment of Rights • Copy of Supplementary Promulgating Order	MJM	
2	Complete special performance evaluation and required CG-3307 entries and forward to HRSIC (ADV) **Note:** Copy of the CG-3307s must be sent to the PERSRU.	10-B-2 PERSMAN PG-7 Instruction	
3	Initiate report to COMDT (W-KS-5). Refer to Section 2-T of the Personnel Security Program, COMDTINST M5520.12 for detailed information.	2-T, PERSEC	

Special or general courts-martial

Follow these procedures after the convening authority has acted on a special or general courts-martial.

Step	Action	Reference	Date
1	Forward copy of promulgating order to PERSRU	MJM	
2	Notify PERSRU of member’s fine repayment intentions (if fine imposed)	MJM	
3	Complete special performance evaluation and required CG-3307 entries and forward to HRSIC (ADV) **Note:** Copy of the CG-3307s must be sent to the PERSRU.	10-B-2 PERSMAN PG-7 Instruction	
4	Initiate report to COMDT (W-KS-5). Refer to Section 2-T of the Personnel Security Program, COMDTINST M5520.12 for detailed information.	2-T PERSEC	

Unauthorized Absence

Introduction

This has been provided as a job aid in determining the procedures when a member is in an unauthorized absence (UA) status.

References

COMDTINST M1000.6 (series), CG Personnel Manual
Article 8-A-1, Unauthorized Absence of Officers
Article 8-A-2, Unauthorized Absence of Enlisted Personnel

UA for less than 24 hours

When a member has been UA for less than 24 hours, the unit is responsible for initiating any and all disciplinary action.

UA for over 24 hours

Use this table when a member fails to report and is placed in unauthorized absence status.

When member	Then the ...	Does this ...
Fails to report in PCS	Unit	Contacts unit from which transferred to determine if orders were amended or canceled
		Notifies PERSRU
Fails to report TAD to unit or enters UA while TAD	TAD unit	Notifies permanent unit
	Permanent unit	Notifies PERSRU that maintains PDR
Fails to report	Unit	Notifies PERSRU

Note: If member is an officer also notify CGPC (opm).

Continued on next page

Unauthorized Absence, Continued

UA for 10 days

When the member has been UA or 10 days, notify the next of kin by letter as follows:

> I regret the necessity of informing you that your (son/daughter/other relationship as appropriate), (insert full name and rate), who enlisted in the Coast Guard on (date of enlistment) and was attached to this unit has been on unauthorized absence since (date). Should you know the whereabouts of your (son/daughter/other relationship), I suggest that you urge your (son/daughter/other relationship) to surrender to the nearest Coast Guard or other military activity immediately since the gravity of the military offense increases with each day of absence. Should your (son/daughter/other relationship) remain absent for 30 days, your (son/daughter/other relationship) will be declared a deserter, and a federal warrant will be issued. Additionally, information concerning the unauthorized absence will be provided to the National Crime Information Center. This information will be available to all law enforcement agencies throughout the country.

For member in paygrade E-4 (less than 4 years service) or more junior, with dependents add the following paragraph in letters to the dependents.

> If your (appropriate relationship) remains in an unauthorized absence status for more than 29 days, you may be entitled to Basic Allowance for Housing (BAH), not to exceed 2 months. To be eligible for BAH you must not be assigned to Government Quarters, and can not be residing with the member. Your request for BAH must be submitted within 3 months of the date that your (appropriate relationship)'s absence commenced. Please include a statement indicating that you are not residing with your (appropriate relationship).
>
> Submit your request to:
>
> COMMANDING OFFICER (MAS)
> COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER
> 444 S. E. QUINCY STREET
> TOPEKA KS 66683-3591
>
> If you have any questions, contact (local unit) for assistance.

- If the member is E-4 (less than 4 years ser vice) or more junior and dependents are residing with a guardian, send a separate letter to the guardian.

Continued on next page

Unauthorized Absence, Continued

UA at time of sailing

Follow these procedures when a member is UA at time of sailing.

Step	Action
1	Complete the following CG-3307 entry (P&D-5) Missed sailing of this vessel from (place of sailing) on (date) on route to (destination). Member had knowledge of the time movement was scheduled. **Note**: Make a notation on the sailing list.
2	If the vessel deploys for 10 or more days: • Administratively transfer the absentee TAD to the nearest PERSRU ashore • Complete a CG-3307 (P&D-5) showing unit transferred to and disposition of records and personal effects • Forward original CG-3307 immediately to CGPC (adm-3), copy to PERSRU and unit file
3	Inventory absentee's personal effects and coordinate with the Transportation Officer for shipment of absentee's personal effects **Note**: Shipment will be charged against the member's pay.
4	If member is absent while the vessel is in a foreign port, report absence to the nearest US consulate. Include instructions for disposition of the absentee if apprehended.

Reporting Civil Arrest or Conviction

Introduction

The arrest or conviction of a Coast Guard member (active or reserve) by civil authorities must be reported in accordance with the following references.

Reference

- COMDTINST M1000.6 (series), CG Personnel Manual, Section 8-B, Civil arrest and conviction
- COMDTINST M5520.12 (series), CG Personnel Security Program, Paragraph 2-T
- COMDTINST M7220.29 (series), CG Pay Manual, Paragraphs 2-C-4, 2-C-5, and 2-C-6

Process Overview

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references.

Stage	Who does it	When	What happens	References
1	Unit	Upon learning of a member's arrest or detention by civil authorities	• Notifies cognizant Security Officer (For units below the Group level this will be the Group Security Officer). • Notifies servicing PERSRU if the member is not entitled to service credit while in the custody of civil authorities.	8-B PERSMAN 2-C-4 PAYMAN
2	Security Officer	Upon notification of member's arrest	• Completes a Personnel Security Action Request (CG-5588) (The form is available in the "Forms Menu" program). • Sends completed CG-5588 to COMDT (W-KS-5). • Sends copies of the report to: CGPC (epm) or (opm) and (adm-3).	2-T PERSEC

Continued on next page

Reporting Civil Arrest or Conviction, Continued

Process Overview, Continued

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references, continued.

Stage	Who does it	When	What happens	References
2 CONT'D	Security Officer	Upon notification of member's arrest	• Sends a copy of the r eport to the district or area security officer (if not collocated).	2-T PERSEC
3	PESRU/ISC	Upon notification of member's arrest and detention beyond the normal expiration of authorized leave or liberty	• Completes a "Begin Confinement" Transaction in SDA II. • Upon the member's return to duty, completes a "Return from Confinement" Transaction".	2-C-4 PAYMAN
4	Security Officer	Within 60 days of the date the incident occurred and every 60 days until final disposition of the case is known	• Submits an interim report to COMDT (W-KS-5) using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).	2-T PERSEC
5	Security Officer	Upon notification of the final disposition of the case	• Submits a Final report to COMDT (W-KS-5), using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).	2-T PERSEC

Forms and Worksheets

Forms and Worksheets

This is a listing of forms and worksheets as they appear in this Enclosure. All of the worksheets and forms contained in this Enclosure are for local reproduction.

Form Number	Form Name
DD Form 2494	Uniformed Services Active Duty Dependent Dental Plan (DPP) Enrollment Election
DD Form 2494-1	Supplemental Uniformed Services Active Duty Dependent Dental Plan (DPP) Enrollment Form
DD Form 2648	Preseparation Counseling Checklist
CG-5489	Waiver/Remission Application
CG-5489A	PERSRU's Endorsement Waiver/Remission Application
CG-5489B	Financial Statement
CG HRSIC-1160	Centralized First Term Reenlistment Review (CFTRR), Application
CG HRSIC-1900	Retired Pay Projection Request
CG HRSIC-2000	PCS Departing Worksheet
CG HRSIC-2005	PCS Reporting Worksheet
CG HRSIC-2010	Advances Worksheet
CG HRSIC-2015	Pay Delivery Worksheet
CG HRSIC-2020	Dependency Worksheet
CG HRSIC-2020A	Support Statement
CG HRSIC-2020B	Full-Time Student Statement
CG HRSIC-2020C	Former Spouse Statement
CG HRSIC-2025	BAH/Housing Worksheet
CG HRSIC-2030	Career Development Worksheet
CG HRSIC-2035	Family Separation Allowance (FSA) Worksheet

Continued on next page

Forms and Worksheets, Continued

Forms and Worksheets, continued

This is a listing of the forms and worksheets as they appear in this Enclosure, continued:

Form Number	Form Name
CG HRSIC-2040	Allotment Worksheet
CG HRSIC-2045	Career Intentions Worksheet
CG HRSIC-2050	Nonreceipt Worksheet
CG HRSIC-2055	Reserve Information Worksheet
CG HRSIC-2060	Bond Worksheet
CG HRSIC-2070	TAD Travel Request/Authorization Worksheet
CG HRSIC-5100	Officer Uniform Allowance Claim Worksheet
CG HRSIC-7210	Designation as Payment Approving Official (PAO)

Department of Transportation U. S. Coast Guard CG -5489A (Rev. 01-98)	**PERSRU'S ENDORSEMENT OF WAIVER/REMISSION APPLICATION**

APPLICANT IDENTIFICATION

1. Name (Last, First, M. I.)	2. SSN	3. Rank/Rate	4. Date of Separation

5. Ship/Station/Unit (including mailing address)

	YES	**NO**	(Check appropriate block)
6.			Has validity of debt or erroneous payment been verified?
7.			Does member's pay account reflect the indebtedness as described?
8.			Does member request consideration based on financial hardship? (If yes, is financial statement attached? ______________ Yes ______________ No)

9. Provide an analysis of how amount of debt was determined. Identify specific items of pay/allowances, monthly rates and inclusive dates. Indicate any entitlements or credits used to offset debt (e.g., BAH(wo) vice BAH(w)). Attach a copy of LESs if not provided by member for the period of overpayment.

Continued on reverse →

10. Furnish a complete explanation of the reason the debt occurred (e.g., administrative error, regulation change, incomplete/erroneous documents, etc.).

11. Do you think the member knew or should have reasonably been aware of this debt before the notification date? If yes, specify actions the member could have taken to report and/or correct the situation(s) leading to the debt. If the member did take action to report and/or correct the situation(s) leading to the debt prior to notification, why was corrective action not taken at that time (e.g., explain why PMIS documents not submitted timely, identify improper procedures, etc.).

Signature Name and Title	Rank/Rate	Date

Department of Transportation U. S. Coast Guard CG -5489B (Rev. 01-98)	**FINANCIAL STATEMENT**

Privacy Act Statement: This information is collected under 10 USC 2774, 14 USC 461, and EO 9397 and is used when considering remission of indebtedness. Failure to provide your social security number will not affect your application; however, failure to provide the other information may prevent favorable consideration of your application.

Part I: INFORMATION COMPLETED BY MEMBER

Name (Last, First, M. I.)	Rank/Rate	SSN

DEPENDENTS

NAME AND ADDRESS	AGE	RELATIONSHIP	% OF SUPPORT

APPLICANT'S MONTHLY INCOME AND EXPENSES

MONTHLY INCOME	AMOUNT	MONTHLY EXPENSES	AMOUNT
Basic Pay	$	FITW	$
Basic Allowance for Housing		SITW	
Basic Allowance for Subsistence		FICA Tax	
Aviation Career Incentive Pay		Rent/House Payment	
Career Sea Pay		Utilities	
Clothing Maintenance Allowance		Telephone	
Other (Specify)		Food	
		Clothing	
		Insurance	
		Car Expenses (Operating)	
Total	$	School	
MONTHLY INSTALLMENT PAYMENT		Medical/Dental	
Item Expires	Amount	Forfeitures of Pay	
Car		Child Support/alimony	
Furniture		Other (Specify)	
Other (Specify)		Other (Specify)	
Total	$	Total	$

RECAP OF TOTAL MONTHLY INCOME

Total Pay and Allowances		$
Total monthly installment payments	$	
Total monthly expenses	$	
Total monthly obligations (Installment payments and expenses)		$
Net income (Total income less total monthly obligations)		$

Spouse's net income	$	OTHER ASSESTS	
Other net income	$	Approximate value of any real estate owned other than home	$
Applicant's net income (from page 1)	$	Average balance of your bank account	$
		Approximate value of stocks, bonds and other securities	$
Total family net monthly income	$	TOTAL	$

I make the foregoing statements as a part of my application with full knowledge of the penalties for willfully making a false statement. 18 USC 1001 provides a penalty as follows: A maximum fine of $10,000 or a maximum imprisonment of 5 years or both.

SIGNATURE OF APPLICANT	DATE	Date application received by Member's Commanding Officer

Part II: INFORMATION COMPLETED BY COMMANDING OFFICER

Are amounts provided by the member reasonable for your locale? Explain any concerns you have with amounts reported.

Do you believe hardship is an appropriate consideration in the member's application? Provide your opinion on the extent of hardship and recommend a monthly collection rate.

Signature Name and Title	Rank/Rate	Date

Department of Transportation U. S. Coast Guard CG HRSIC-2000 (Rev. 01-98)	**PCS Departing Worksheet**

SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to indicate the amount of leave desired, the number of dependents traveling, the make and model of the Privately Owned Conveyance(s) that will be driven (or shipped) to the permanent duty station and the type of advances requested. If you have any questions, **TALK TO YOUR YEOMAN**.

UNIT

New Duty Station	Authorized Proceed Time	Authorized Travel Time

Date to report _______________ or date to depart _______________ (as specified by issuing authority)

Does member meet obligated Service? (see 4-C CG PERSMAN)		Yes		No	If no, complete and attach a Career Intentions Worksheet (CG-HRSIC-2045)

MEMBER

Date to depart unit ___________

I request ___________ days of leave.

My current leave balance is: ____________

Leave Address	Phone #

Ž List dependents traveling. If traveling on a different date as member, enter date ____________.

Dependent Name	**Relationship**	**DOB/DOM**

Ž I will be traveling via listed POC (may be authorized two).

Year	**Make/Model**	**Tag Number**

Ž I will be shipping a POV (authorized one), from _________________________ to _________________________
(Overseas or INCONUS with COMDT approval only) Enter year, make, model and tag number above.

[ ] Advance Pay	_____# months requested (max. of 3); or, ____________ specific amount requested	Liquidation period (12 months is max., 24 with CO approval due to hardship caused by PCS, see reverse): # of months ____________

[ ] Advance Pay and Allowances **Note**: Advance can only cover missed paydays.

[ ] *Advance Dislocation Allowance (DLA) **Note**: Single members must obtain certification that gov't qtrs are not available

[ ] *Advance MALT plus Per Diem for POC Travel	From	To
[ ] *Advance Dependent MALT plus Per Diem	From	To
[ ] Government Procured Transportation [ ] Mbr [ ] Dpns	From	To

***Note: When requesting advance travel or DLA, complete and attach an Application for Advance of Funds (form SF-1038)**

MISCELLANEOUS

Do you currently live in government quarters?	Yes	No
Do you hold a government American Express Card?	Yes	No
Do you hold a government Impact Visa card?	Yes	No

Household Goods - Contact your servicing Transportation Officer (T.O.P.S site) to arrange for shipment of household goods

Temporary Lodging Expense (TLE) Authorized to members and their dependents when it is necessary for them to occupy temporary lodging. TLE is authorized for a total of 10 days for CONUS to CONUS and OUTCONUS to CONUS transfers. TLE is authorized for a total for 5 days for CONUS to OUTCONUS transfers. TLE may be utilized before departing the old PDS, during the elapsed time between PDSs (not including travel days for which per diem is payable), after arrival at the new PDS, or a combination equal to the authorized total.

Temporary Lodging Allowance (TLA) Authorized to partially reimburse a member for the more than normal expenses incurred during occupancy of temporary lodgings and expenses of meals obtained as a direct result use of temporary lodgings outside the continental U. S. which do not have facilities for preparing and consuming meals. The overseas commander will determine if it is necessary for the member and/or dependent(s) to occupy temporary lodgings when they arrive at an overseas PDS. TLA may also be authorized upon departure from and overseas PDS for a period not to exceed 10 days.

Advance Pay A maximum of 3 months pay or specified amount not to exceed 3 months pay may be requested. Repayment of advance is by payroll deduction and will normally not exceed 12 months. Repayment of Advance Pay in excess of 12 months can only be authorized by your CO and only in the case of severe personal financial hardship caused by the PCS transfer. Attach your letter requesting repayment in excess of 12 months and your CO's endorsement to this worksheet.

Advance Pay & Allowances You must be absent over at least one payday while en route under PCS orders and you **CANNOT BE ON DIRECT DEPOSIT**. Your commanding officer must approve this request. Repayment will be made as accrued. This means one months advance pay and allowance will result in two missed paydays. The advance can only cover paydays that you will miss while en route.

TRAVEL ADVANCES

Government Procured Transportation - Government purchased airline tickets for you and/or your dependents

Malt - Authorized for the official distance of the PCS transfer at the following rates:
(as determined by the official Table of Distance Guide)

- $0.15 per mile = 1 traveler
- $0.17 per mile = 2 travelers
- $0.19 per mile = 3 travelers
- $0.20 per mile = 4 travelers

Per Diem - Authorized for each authorized day of travel time in connection with a PCS transfer, as follows:

- $50.00 per day for the member
- $37.50 per day for each dependent 12 years and older
- $25.00 per day for each dependent under 12 years old
- $50.00 a day for a dependent, if traveling separate from the member

DLA - Payable to members in receipt of PCS orders at a rate of 2 ½ months BAH Type II.
With dependents - payable to all personnel with dependents.
Without dependents - payable to personnel without dependents who will not be assigned to government quarters. However, advance DLA cannot be paid until you have confirmation releasing you from mandatory government quarters assignment.

Privacy Act Statement

In accordance with 5 USC Section 522a(e)(3), the following information is provided to you when supplying personal information to the U. S. Coast Guard: Authority - 10 USC Section 2771. Principal Purpose(s) - Used to indicate member's intentions during travel to next permanent duty station. Routine Uses - Same. Disclosure - Disclosure of this information is voluntary, but without disclosure the member may not receive advances.

Member's Signature	Date:	
Supervisor's Signature	Date:	**For PERSRU Use Only**
Department Head's Signature	Date:	Command Checklist for Overseas Screening Verified by PERSRU Supervisor (if applicable): Initials: ___________ Date: ___________
Command Approval	Date:	Action Completed Initials: ___________ Date: ___________

Department of Transportation U. S. Coast Guard CG HRSIC-2005 (Rev. 01-98)	# PCS Reporting Worksheet

SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to indicate changes in mode of travel, TAD, and requested advances; changes in dependency, pay delivery, state or federal tax withholdings; updating allotments, ID cards, and to update your mailing address. If you have **any** questions, **TALK TO YOUR YEOMAN**.

Complete the following:	**Date Completed**
1. A DD-Form-1172 to update the DEERS database (visit your nearest ID card facility)	
2. Update and verify the information on your CG-4170A (BAH/Emergency Data)	
3. A Travel Claim for you and your dependents	
4. A BAH/Housing Worksheet (CG HRSIC 2025)	
5. An Allotment Worksheet (CG HRSIC-2040) to update allotment addresses	
6. A Bond Worksheet (CG HRSIC-2060) to update bond addresses	
7. An Assignment Data form (CG-3698A) within 6 months of reporting to unit	

WHAT IS YOUR NEW MAILING ADDRESS?
PERSRU will use this information to update block 22 of your LES

Address ____

City ____

State _____________ Zip Code _____________ (Zip + 4) Phone Number (_____) _____ - ________

***This will NOT change your allotment or bond addresses, submit the appropriate worksheet to change.**

Date Reported: _________________ **Time Reported:** _________________

Yes	No	**Answer the questions below. Your response(s) will determine which action(s) the PERSRU will complete.**
		Did you travel as directed on your orders? (If no, explain the changes)
		Did you go TAD/TDY in connection with this PCS transfer?
		Do you want advances? (If yes, submit an Advances Worksheet)
		Do you want to change where or how you receive your pay? (If yes, submit a Pay Delivery Worksheet)
		Are the addresses for your allotments and bonds current? (If no, submit an Allotment or Bond Worksheet)
		Are you changing your state or federal tax withholding or do you need to resume state tax collection due to residing in your legal state of residence? (If yes, contact your yeoman for specific state withholding procedures)
		Have you had any change in dependency? (If yes, submit a Dependency Worksheet and DD-Form-1172)
		Do you want Family Mbr. Dental coverage for your dependents? (If yes, submit DD-Form-2494 or DD-Form-2494-1)
		Did you participate in the last SWE?
		Is your ID card and or your dependents ID card current?
		Are you entitled to Family Separation-Housing (FSH)? Note: Transportation of dependents is not authorized at government expense to your new unit or to a place near your unit. No government family-type quarters are available for assignment to you.

Common Problems

PCS Reporting/ Departing

Failure To……….	May Result In……….
update allotment/bond address	nonreceipt of allotment/bond
update DEERS information	• denied payment of CHAMPUS/Tri Care Claims • delays in payment of CHAMPUS/Tri Care Claims • denied enrollment in Family Mbr. Dental Plan • denied treatment MTFs
enroll dependents in Family member Dental Plan	denied payment of FMDP claims
update Pay Delivery Worksheet	pay not being delivered to intended place
update Dependency Worksheet	underpayment/overpayment of BAH/COLA/OHA/DLA and travel
report unknown payments or deduction(s) reflected on your LES	underpayment or overpayment

PCS Reporting Only

Failure To……….	Will Result In……….
file member and or dependent travel claims	recoupment of all member and or dependent travel advances, including DLA
submit BAH Worksheet	delay of entitlement to BAH rate at new Duty Station

Privacy Act Statement

In accordance with 5 USC Section 522a(e)(3), the following Information is provided to you when supplying personal information to the U. S. Coast Guard:
Authority **-** 10 USC Section 2771. Principal Purpose(s) **-** Used to update member's records upon reporting to a new permanent duty station. Routine uses **-** Same. Disclosure **-** Disclosure of information is voluntary, but without disclosure the member may encounter problems with pay, taxes, dependent coverage and current identification cards.

Member's Signature	Date:	**For PERSRU Use Only**	
Command Approval	Date:	Action Completed Date: ___________	Initials: ___________

Department of Transportation U. S. Coast Guard CG HRSIC-2010 (Rev. 01-98)	**Advances Worksheet**	
SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to request advance pay, advance pay and allowances, and advance BAH/OHA and DLA.

PCS Departure Date (if applicable)	Number of months requested ________ Or Specific amount $____________	Liquidation period requested (# of months) See notes.

I request:

☐ Advance pay

☐ Advance DLA ☐ Advance pay and allowances

☐ Advance BAH ☐ Advance OHA

Advance Pay

Advance pay may not be paid before receipt of PCS orders, nor more than 60 days after arrival at new unit. You may request an amount not to exceed 3 months basic pay less taxes, SGLI, and debts. Repayment of advance pay is by payroll deduction. Advance pay can be liquidated over a minimum period of one month, up to a maximum of 12 months. A member can request liquidation over a period greater than 12 months, not to exceed 24 months, when the PCS move causes unusually large expenses and repayment within 12 months would create a severe personal financial hardship. Only your CO can approve requests for liquidation greater than 12 months. Attach your request and CO's endorsement to this worksheet.

Advance Pay and Allowances

In order to receive advance pay and allowances, you must be absent over at least one payday while en route under PCS orders and you **CANNOT BE ON DIRECT DEPOSIT**. Your commanding officer must approve this request. Repayment will be made as accrued. This means one months advance pay and allowances will result in 2 missed paydays. You may request an amount not to exceed 3 months pay and allowances less taxes, SGLI, allotments, and debts. The advance can only cover paydays that you will miss while you are en route.

Advance BAH/OHA

Advance BAH and OHA allowances are normally paid within three working days of date of mortgage or rental payment. Liquidation begins the first day of the month following the advance, but may be postponed for up to three months upon justification and approval of the commanding officer. Action to recoup in a lump sum any advance made under this paragraph that has been returned to the member by the landlord will be taken immediately upon receipt of information that the member has vacated the housing for which the advance was made. Any balance of an advance not returned by the landlord may be liquidated in monthly installments, if desired by the member, for a period over the balance of the months remaining on the existing loan repayment schedule.

Advance DLA

DLA is payable to members in receipt of PCS orders at a rate equal to two and one half (2 ½) months BAH Type II. DLA is payable to all members with dependents provided their dependents relocate. Members without dependents must be release from mandatory government quarters assignment before receiving DLA.

PRIVACY ACT STATEMENT

In accordance with 5 USC Section 522a(e)(3), the following information is provided to you when supplying personal information to the U. S. Coast Guard:
Authority - 10 USC Section 2771. Principal Purpose(s) - Used to indicate desired or additional advance(s). Routine uses - same. Disclosure - Disclosure of this information is voluntary, but without disclosure the member may not receive requested advance(s).

Member's Signature	Date:	**For PERSRU Use Only**	
Command Approval	Date:	Action Completed Date: ____________	Initials: __________

(Reverse Blank)

Department of Transportation U. S. Coast Guard CG HRSIC-2020 (Rev. 01-98)	**Dependency Worksheet**	
SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to add/delete BAH eligible dependent(s) listed on your CG-4170A.

EMERGENCY DATA: Report changes in beneficiaries and other emergency data information by updating/completing a CG-4170A.

DEERS: When reporting dependency changes you must also complete a DD-Form-1172 at your servicing ID card issuing facility to update the DEERS database. When adding dependents, failure to update DEERS will result in denial of medical/dental benefits. When deleting dependents, failure to update DEERS could result in continued deductions of premiums for the Family Member Dental Plan (FMDP) or medical/dental benefits being provided to a person who is no longer eligible.

Add dependent, (see documentation requirements on reverse side)	Delete dependent (Attach copy of Separation Agreement, Final/Interlocutory Reason: _________ Divorce/Annulment decree or death certificate if applicable)		
Name (Last, First, MI):			SSN:
Address (Street, City, State, Zip):			
AC & Home Phone:	AC & Work Phone:	Relationship:	
Date of Birth:	Dependency Date:	Date of Marriage:	Notify in case of emergency?
If spouse is in the service provide: SSN (above) Branch:	Duty Station:		
If the dependent child does not reside with you provide: Amount of support $__________ Date of divorce/separation: ___________ Name of Custodian ____ Method of support ____________________________________			

Add dependent, (see documentation Requirements on reverse side	Delete dependent (Attach copy of Separation Agreement, Final/Interlocutory Reason: _________ Divorce/Annulment decree or death certificate if applicable)		
Name (Last, First, MI):			SSN:
Address (Street, City, State, Zip):			
AC & Home Phone:	AC & Work Phone:	Relationship:	
Date of Birth:	Dependency Date:	Date of Marriage:	Notify in case of emergency?
If spouse is in the service provide: SSN (above) Branch:	Duty Station:		
If the dependent child does not reside with you provide: Amount of support $__________ Date of divorce/separation: ___________ Name of Custodian ____ Method of support ____________________________________			

PRIVACY ACT STATEMENT

In accordance with 5 USC Section 522a(e)(3), the following information is provided to you when supplying personal information to the U. S. Coast Guard: Authority - 37 USC Section 403. Principal Purpose(s) - Used to indicate start or change in dependency. Routine uses - same. Disclosure - Disclosure of this information is voluntary, but without disclosure inaccuracies may occur with member's current dependent status, which in turn may effect the member's pay.

Member's Signature	Date:	**For PERSRU Use Only**	
Command Approval	Date:	Action Completed Date: _____________	Initials: ___________

Supporting documentation requirements are listed on the reverse side of this worksheet. →

DEPENDENCY DOCUMENTATION REQUIREMENTS

RULES:

- The member must furnish documentary proof of dependency.
- Unless otherwise specified, legible photostatic copies or properly notarized legible copies of original documents are acceptable.
- Costs associated with obtaining, certifying or translating documents are the responsibility of the member. Documents will be returned to the member.
- To delete a dependent, submit divorce or annulment decree, death certificate, etc...
- To add a dependent submit the appropriate documentation as indicated below.

Relationship	And	Documentation to be submitted	See PAYMAN Section
SPOUSE	U. S. MARRIAGE	Marriage certificate	3-E-3.a.
	*FOREIGN MARRIAGE	Translated marriage certificate and CG-4170A	3-E-3.a.
	*COMMON LAW	Affidavit and CG-4170A	3-E-3.a.(1)
	PREVIOUSLY MARRIED	Final divorce/annulment decree	3-E-3.a.(2)
LEGITIMATE CHILD		Birth certificate	3-E-3.b.
ADOPTED CHILD		Amended birth certificate and adoption decree (final or interlocutory)	3-E-3.d.(1)
CHILD PLACED FOR ADOPTION		Birth certificate, court order, and documents from placement agency	3-E-3.d.(2)
STEPCHILD		Birth certificate, marriage certificate and spouse's divorce decree	3-E-3.e.
ILLEGITIMATE CHILD	MEMBER-MOTHER HAS CUSTODY	Birth certificate	3-E-3.f.(1)
	MEMBER FATHER HAS CUSTODY	Birth certificate, proof of parentage, and CG-4170A	3-E-3.f.(2)
	*MEMBER-MOTHER DOES NOT HAVE CUSTODY	Birth certificate, support statement (CG HRSIC-2020A), and CG-4170A	3-E-2.e.(3)
	*MEMBER-FATHER DOES NOT HAVE CUSTODY	Birth certificate, proof of parentage, support statement (CG HRSIC-2020A), and CG-4170A	3-E-2.e.(3)
WARD	*DEPENDENT ON THE MEMBER FOR OVER ½ OF SUPPORT	Support statement (CG HRSIC-2020A), birth certificate, court order, and CG-4170A.	3-E,
CHILD OVER AGE 21 Legitimate, Illegitimate, adopted, stepchild or ward	*INCAPACITATED	Doctor's statement, birth certificate, support statement (CG HRSIC-2020A), court order or adoption decree, and CG-4170A	3-D-4.b.(5), 3-E-2.f.(1) Figure 3-8, Note 6
	FULL TIME STUDENT UNDER AGE 23	Birth certificate, support statement (CG HRSIC-2020A) support statement for full-time student (CG HRSIC-2020B), proof of full-time student status, court order or adoption decree (if necessary)	3-E-3.c.(2)
PARENT, PARENT-IN-LAW, PARENT IN LOCO PARENTIS, STEPPARENT, PARENT BY ADOPTION	*DEPENDENT ON THE MEMBER FOR OVER ½ OF SUPPORT	Support statement (CG HRSIC-2020A), statement showing member's financial contributions for the past six months, and CG-4170A	3-E-3.g.

Note: For all children, proof of support is also required if the child is not in the custody of the member.

(*): These claims must be reviewed and approved by CO, HRSIC (LGL). Send this form along with other supporting documentation to your PERSRU first. They will update your CG-4170A form and forward it to HRSIC for approval. **Do not send this form directly to HRSIC.**

Department of Transportation U. S. Coast Guard CG HRSIC-2020A (Rev. 01-98)	**SUPPORT STATEMENT**

PRIVACY ACT STATEMENT: This information is collected under 37 USC Section 403, 14 USC Section 461, and EO 9397 and is used when considering application for BAH and/or ID cards. Failure to provide your social security number will not affect your application; however, failure to provide the other information may prevent favorable consideration of your application.

PURPOSE: Use this form to provide proof that a claimed dependent is in fact dependent on the sponsor for more than one-half of their support.

Part I: INFORMATION COMPLETED BY SPONSOR

Name (Last, First, MI)	RANK/RATE	SSN

Number of people in sponsor's household (do not include the family member that this form is for)	

Part II: SPONSOR'S MONTHLY EXPENSES AND INCOME		Part III: CLAIMED DEPENDENT'S MONTHLY EXPENSES AND INCOME	
MONTHLY EXPENSES		**MONTHLY EXPENSES**	
1. Medical/Dental	$	16. Medical/Dental	$
2. Transportation		17. Transportation	
3. Taxes		18. Taxes	
4. Rent/House Payment		19. Rent/House Payment	
5. Utilities/Telephone		20. Utilities/Telephone	
6. Food		21. Food	
7. Clothing		22. Clothing	
8. Insurance		23. Insurance	
9. Other (Specify)		24. Other (Specify) Do not list loans, credit cards or other personal debts	
10. **Total Monthly Expenses**		25. **Total Monthly Expenses**	
11. Total monthly Pay & Allowances		26. Social security income	
12. Spouse's monthly income		27. Interest on savings	
13. Other income		28. Other income	
14. **Total family monthly income**		29. **Total monthly income**	
15. Amount of monthly contribution to support claimed dependent for whom this statement is being submitted.			

Enter the date that the sponsor began making contributions to support the claimed dependent:	

Go to the reverse side of this form to complete support test. →

Part IV: SUPPORT TEST

30. Divide the amount in item 25 by 2, enter result (½ of expenses)		
31. Enter the claimed dependent's income from item 29,		
32. Enter sponsor's monthly contribution to support from item 15		
Use the amounts in items 30-32 to answer these questions	**YES**	**NO**
33. Is the amount in item 30 greater than the amount in item 31?		
34. Is the amount in item 32 greater than the amount in item 31?		

If answers to -	**are**	**then**
both 33 & 34	yes	complete part V and forward application to PERSRU for consideration
either or both 33 & 34	no	claimed dependent does not receive over ½ of support from sponsor

Part V: CERTIFICATION SECTION

Note: Have all signatures notarized if this statement is for a dependent ID card.

I (we) certify that this support statement is true and accurate.

I (we) make the foregoing statements as a part of my (our) application with full knowledge of the penalties for willfully making a false statement. 18 USC Section 1001 provides a penalty as follows: A maximum fine of $10,000 or a maximum imprisonment of 5 years or both.

SIGNATURE OF PARENT(s) OR PARENT(s)-IN-LAW (leave blank if this statement is for a child)

______________________________ Date ______________/______________________________ Date _________________

SIGNATURE OF SPONSOR

______________________________ Date _________________

Part VI: WHAT TO ATTACH AND WHERE TO SEND

If this statement is being used to support a claim for a dependent	**and is for a**	**attach** **Note:** documentation requirements for adopted, illegitimate, or stepchildren are listed on CG HRSIC 2020	**then send to**
Child age 21-23 full-time student	ID Card	DD form-1172, Birth certificate, CG HRSIC-2020B, and , proof of full-time student status.	Local ID issuing auth.
Incapacitated Child over 21	ID Card	DD form-1172 Birth certificate, doctor's statement, certified copy of sponsor's latest federal income tax return, claiming child as dependent, and statement from SSA denying Medicare Part " A" .	HRSIC RAS
Parent, Parent-in-law	ID Card	DD form-1172 & certified copy of sponsor's latest federal income tax return showing parent claimed s a dependent.	HRSIC RAS
Child age 21-23 full-time student	BAH claim	Birth certificate, CG HRSIC-2020B, and proof of full time student status.	PERSRU
*Incapacitated Child over 21	BAH claim	Birth certificate, and doctor's statement.	PERSRU
*Ward	BAH claim	Birth certificate and a notarized affidavit by member that ward resides with member or does not reside with member because of institutionalized care for a disability/incapacity or does not reside with member because a separation necessitated by the member military orders.	PERSRU
*Parent, Parent-in-law	BAH claim	A statement of parent(s) or parent(s)-in-law postal address.	PERSRU

(*): These claims must be reviewed and approved by CO, HRSIC (LGL). Send this form along with other supporting documentation to your PERSRU first. They will update your CG-4170A form and forward it to HRSIC for approval. Do not send this form directly to HRSIC (LGL)

Department of Transportation U. S. Coast Guard CG HRSIC-2025 (Rev. 01-98)	**BAH/Housing Worksheet**

SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to indicate current housing status.

SPOUSE INFORMATION

If you are married to a military service member, enter spouse information:

SSN ____ Pay Grade _____________________

Spouse's Branch of Service Ž USCG Ž USAF Ž USA

Ž USN Ž USMC Ž Other _______________

Spouse's duty zip code and duty unit ____

Do you maintain a joint residence? _________Yes _________No

Spouse BAH status Ž with dep Ž without dep Ž partial Ž none

HOUSING INFORMATION

My current housing address is:
(enter below)

Ž I want this address used as my mailing address on my LES (block 22)

Note: If you have dependents and they do not reside with you at this address, attach a separate sheet with their complete address and zip code.

Address ____

City ____

State ____________________ Zip Code ______________________

My status is: (enter below)

Ž Living at my own cost	
Ž CG owned housing	Ž DOD owned housing
Ž CG leased housing	Ž DOD leased housing
Ž CG barracks or shipboard berthing	Ž DOD barracks or shipboard berthing

PRIVACY ACT STATEMENT

In accordance with 5 USC Section 522a(e)(3), the following Information is provided to you when supplying personal information to the U. S. Coast Guard.
Authority - 14 USC Section 632 and 37 USC Section 403a. Principal Purpose (s) - Used to indicated current housing status and to validate the amount of member's BAH Payment.
Disclosure - Disclosure of this information is voluntary, but without disclosure member may not receive correct payment of BAH.

Member's Signature	Date:	**For PERSRU Use Only**	
Command Approval	Date:	Action Completed Date: __________	Initials: __________

Department of Transportation U. S. Coast Guard CG HRSIC-2030 (Rev. 01-98)	**Career Development Worksheet**

SSN	Name (Last, First, MI)	Permanent Unit

PURPOSE: Use this form to request change in pay grade, advancement/change in rating (without participating in SWE) and to report course completion, or add or delete a qualification code.

I Request:

☐ Advancement to pay grade:

_____ E-2 _____ E-3 _____ E-4

☐ to be restored to my prior pay grade.

☐ to change my path of advancement to:

_____ SN _____ FN

Part II: INFORMATION COMPLETED BY UNIT

Member must meet the appropriate criteria listed in Chapter 5-C, CG Personnel Manual

Ž Has completed all required performance qualifications, military requirements and correspondence courses.

Ž Has successfully completed service course (Class “A” school) if required for particular rating.

Ž Meets citizenship or security clearance

Ž Is not involved in circumstances which render him/her ineligible for advancement (i.e., member meets weight requirements, etc.).

Ž Is in proper path of advancement.

Ž Meets special requirements for rating.

Ž Meets citizenship or security clearance requirements for rate or rating.

Ž Has no factor mark on last evaluation that is below the minimum requirement for pay grade.

Ž Member is recommended	Ž Member is not recommended	Signature of Supervisor (Ensure Advancement Evaluation is submitted, if applicable)	Date:

Enter the course title:

Course Title	6-Digit Course/PMIS Code						Date Begun	Date Ended

Enter Award or Qualification Code: Adding __________ Deleting __________

Award or Qualification Code	Effective Date

Privacy Act Statement: In accordance with 5 USC Section 522a(e)(3), the following Information is provided to you when supplying personal information to the U. S. Coast Guard: Authority - 10 USC Section 2771. Principal Purpose(s) - Used to request a change in pay grade. Routine use(s) - Used to update and delete qualification codes, and to report course completion. Disclosure of this information is voluntary.

Member’s Signature	Date:	**For PERSRU Use Only**	
Command Approval (Ensure Advancement Evaluation has been completed, if applicable)	Date:	Action Completed Date: ___________	Initials: ___________

Department of Transportation U. S. Coast Guard CG HRSIC-2035 (Rev. 01-98)	**FAMILY SEPARATION ALLOWANCE WORKSHEET**

Purpose: Use this form to substantiate entitlement to FSA. The member will complete member certification section. The unit will indicate the type of FSA the member is entitled to and will forward to the PERSRU.

Name (Last, First, MI.)	SSN	Permanent Unit:

Types of FSA:

FSA-R For personnel serving in a dependent restricted assignment
FSA-S For personnel permanently assigned to a ship which deployed in excess of 30 days.
FSA-T For TAD assignments, including TAD to a ship which deployed in excess of 30 days.

MEMBER CERTIFICATION

If I become eligible for FSA, I certify that I maintain a residence(s) for my dependent(s) and have assumed the liabilities and responsibilities thereof, at the address shown below, where I will reside during periods of leave or such other times as my duty assignment permit. I agree to notify my Commanding Officer promptly of any change in dependency status, if my sole dependent or all of my dependents move to the area of this station, or if my dependent(s) visit at this station for more than three months (30 days in the case of FSA-S and FSA-T) while I am in receipt of Family Separation Allowance.

Address(es) of Dependent(s):

I understand that I am not eligible for FSA when:

- My sole dependent is a spouse legally separated or my child(ren) is in the legal custody of another person
- My dependent parent does not reside in my home which I control, supervise, and maintain for mutual use when circumstances permit (43 Comp Gen 44, 46, and 148)
- I am married-member-to-member and I was not residing together with my s pouse immediately before being separated by reason of execution of military orders
- My sole dependent is not in an institution for a known period of over one year or an indefinite period which may be expected to exceed one year.

Member's Signature:	Date:

Indicate type of FSA (FSA-R and FSA-T only):

☐ **FSA - R** Member departed from _______________ on _______________ (date) was on leave enroute _____________ proceed time _____ and reported to _______________ on _______________ (date). Transportation of dependents is not authorized at government expense to this station or to a place near this station.

☐ **FSA - T** Member has been ordered to and has performed temporary duty for a continuous period of more than 30 days at the following location(s): ___________________________ (location) ___________________________ (inclusive dates at location).
___________________________ (location) ___________________________ (inclusive dates at location).
___________________________ (location) ___________________________ (inclusive dates at location).

Privacy Act Statement: In accordance with 5 USC section 552a(e)(3), the following information is provided to you when supplying personal information to the U.S. Coast Guard: Authority - 10 USC Section 2771. Principal Purpose(s) - Used to indicate entitlement of FSA. Routine Uses(s) - Same. Disclosure - Voluntary.

Command Endorsement		**PERSRU Use Only (For FSA-R and FSA-T only)**	
Command Approval:	Date:	Action Completed Date:	Initials:

Department of Transportation U. S. Coast Guard CG HRSIC-2070 (Rev. 01-98)	**TAD TRAVEL REQUEST/AUTHORIZATION WORKSHEET**

SSN	Name (Last, First, MI)	
GRADE/RATE	DIV/BRANCH	OFFICE PHONE NUMBER

PURPOSE: Use this form to indicate mode of travel, and desired advances for TAD travel. If you have any questions, **TALK TO YOUR UNIT ADMIN**.

PRIVACY ACT STATEMENT: In accordance with 5 USC Section 522a(e)(3), the following information is provided to you when supplying personal information to the U. S. Coast Guard:

- **Authority -** 10 USC Section 2771.
- **Principal Purpose -** Used to indicate member's intentions during TAD travel.
- **Routine Uses -** Same.
- **Disclosure -** Disclosure of this information is voluntary, but without disclosure member may not receive advances.

ATTACH THE FOLLOWING:

- Copy of authority for TAD.

Enter Travel Order Number (TONO) and accounting data:

DEPARTURE DATE: ________________ ESTIMATED DAYS ABSENT: __________________

RETURN DATE: ____________________ DESTINATION: ______________________________

PURPOSE OF TAD: _____________________

DO YOU HAVE A GOVERNMENT CHARGE CARD? [ ] YES [ ] NO

[ ] I request leave.

Date to begin leave _______

LEAVE ADDRESS	PHONE#

Enter leave amount _______

Traveler's Mode of Transportation

	GOVERNMENT CONVEYANCE
	PRIVATELY OWNED VEHICLE (POV)
	COMMERCIAL AIR: PRICE OF TICKET $____________________
	GOVERNMENT PROCURED TRANSPORTATION
	RENTAL CAR: PRICE OF RENTAL CAR $____________________

Continued on reverse →

Reverse of CG HRSIC-2070 TAD TRAVEL REQUEST/AUTHORIZATION WORKSHEET

Advances	**YES**	**NO**
ARE GOVERNMENT QUARTERS USE DIRECTED?		
IS GOVERNMENT MESSING USE DIRECTED?		
WOULD YOU LIKE ADVANCE PER DIEM? (IF YES, AMOUNT $___________)		

MEMBER'S COMMENTS

DATE	MEMBER'S SIGNATURE

SUPERVISOR'S COMMENTS:

DATE	SUPERVISOR'S SIGNATURE (Does member meet weight requirements IAW COMDTINST M1020.8?) Yes No (if no, refer to COMDTINST M1020.8 for guidance)
DATE	SIGNATURE OF FUNDS APPROVING OFFICIAL (if applicable)
DATE	APPROVING OFFICAL'S SIGNATURE

For PERSRU/Unit Administration use only

a. Lodging Rate: $_________________	b. M&IE Rate: $__________________
c. Days TAD: ____________________	d. Total Per Diem Cost: (a+b)c $_________________

Orders completed. Date ________________
Leave (if requested) recorded on CG-2519. Date ________________
Initials: ________________

Block by Block Description of the Personnel Data Information File (PDIF)

Member's Last Name — Member's last name, e.g., "HUSKEY" for Michael L. Huskey.

Member's First Name — Member's first name, e.g., MICHAEL.

Member's Middle Initial and 2ND Middle Initial — Member's first middle initial or first letter of first middle name, e.g., P for John Paul George Smith.

Member's Name Suffix — Suffix to member's name, e.g., JR, SR, III.

Member's Sex — M - Male F - Female

Birth — Member's birth date.

Height — Member's height.

Weight — Member's current weight. If weight information is not being updated on member, this information could be old.

Member Type — A three character alpha code to identify the member by type (such as commissioned officer, warrant officer, enlisted or cadet); by component (regular or reserve); and by type of duty (special active duty, extended active duty, or active duty for training).

Code	Meaning
AEO	Officer Candidate Regular
AEZ	Regular Active Duty Enlisted
AOZ	Regular Active Duty Commissioned Officer
AWZ	Regular Active Duty Warrant Officer
FEB	Reserve Enlisted on Extended Active Duty
FED	Reserve Enlisted on Active Duty for Special Work - Reserve Component (GE 140 dys)
FEE	Reserve Enlisted on Active Duty for Training - Other Training Duty (GE 140 dys)
FEG	Reserve Enlisted on Active Duty for Special Work - Active Component (GE 140 dys)
FEH	Reserve Enlisted on Initial Active Duty for Training
FEO	Officer Candidate Reserve
FOB	Reserve Commissioned Officer on Extended Active Duty

Continued on Next Page

Block by Block Description of the Personnel Data Information File (PDIF) (cont.)

Member Type, Continued

Code	Meaning
FOD	Reserve Commissioned Officer on Active Duty for Special Work - Reserve Component (GE 140 dys)
FOE	Reserve Commissioned Officer on Active Duty for Training - Other Training Duty (GE 140 dys)
FOG	Reserve Commissioned Officer on Active Duty for Special Work - Active Component (GE 140 dys)
FWB	Reserve Warrant Officer on Extended Active Duty
FWD	Reserve Warrant Officer on Active Duty for Special Work Reserve Component (GE 140 dys)
FWE	Reserve Warrant Officer on Active Duty for Training - Other Training Duty (GE 140 dys)
FWG	Reserve Warrant Officer on Temporary Active Duty for Special Work - Active Component (GE 140 dys)
HEZ	Select (drilling) Reserve Enlisted
HOZ	Select (drilling) Reserve Commissioned Officer
HWZ	Select (drilling) Reserve Warrant Officer
IEZ	Reserve Enlisted Individual Ready Reserve
IOZ	Reserve Commissioned Officer Individual Ready Reserve
IWZ	Reserve Warrant officer Individual Ready Reserve
JEL	Reserve Enlisted Standby Active
JEM	Reserve Enlisted Standby Inactive
JOL	Reserve Commissioned Officer Standby Active
JOM	Reserve Commissioned Officer Standby Inactive
JWL	Reserve Warrant Officer Standby Active
JWM	Reserve Warrant Officer Standby Inactive
LEJ	Reserve Enlisted Retired with Pay
LEK	Reserve Enlisted Retired Awaiting Pay at 60
LER	Retired Reserve Enlisted Recalled to Active Duty
LEZ	Reserve Enlisted Retired Without Pay
LOJ	Reserve Commissioned Officer Retired with Pay
LOK	Reserve Commissioned Officer Retired Awaiting Pay at 60
LOR	Retired Reserve Commissioned Officer Recalled to Active Duty
LOZ	Reserve Commissioned Officer retired Without Pay
LWJ	Reserve Warrant Officer Retired with Pay
LWK	Reserve Warrant Officer Retired Awaiting Pay at 60
LWR	Retired Reserve Warrant officer Recalled to Active Duty
LWZ	Reserve Warrant Officer Retired Without Pay
NEZ	Delayed Enlistment
PZA	Aviation Cadet
PEZ	Coast Guard Academy Cadet
REJ	Regular Enlisted Retired With Pay
RER	Retired Active Duty Enlisted Recalled to Active Duty
ROJ	Regular Commissioned Officer Retired With Pay
ROR	Regular Active Duty Commissioned Officer Recalled to Active Duty
RWJ	Regular Warrant Officer Retired With Pay
RWR	Retired Active Duty Warrant Officer Recalled to Active Duty
TOJ	NOAA Commissioned Officer Retired With Pay
TOR	NOAA Commissioned Officer Recalled to Active Duty
TOZ	NOAA Commissioned Officer
VOZ	USPHS
Blank	Aviation Cadet Reserve

Rank Member's date of rank.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont.)

Minority Code

A one character code to identify the racial or ethnic group of which the member is considered to be part of.

Code	**Designation**
1	Black
2	Hispanic (includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish origin or culture regardless of race)
3	American Indian (including Alaskan natives)
4	Asian (including Pacific Islanders)
5	All others (e.g., White/Caucasian, etc.)

BAH Code

A one-character code to indicate the type of BAH to which a member is entitled

Code	MEANING	ENTITLED TO BAH
A	With dependents; member and/or dependents assigned adequate CG-owned family quarters.	No
B	With dependents; member and/or dependents assigned adequate CG-leased family quarters.	No
C	With dependents; member and/or dependents assigned adequate DOD-owned family quarters.	No
D	Without dependents, or with spouse in service and no other dependents; member assigned adequate CG-owned single quarters (barracks or shipboard berthing).	Yes (Partial)
E	Without dependents, or with spouse in service and not other dependents; member assigned adequate CG leased quarters; CG-owned family quarters, or DOD-owned family quarters.	No
F	Without dependents; or with spouse in service and no other dependents; member assigned DOD-owned single quarters (barracks or shipboard berthing).	Yes (Partial)
G	Without dependents; member not assigned government quarters.	Yes (Without Dependents)
H*	Spouse in Service and no other dependents; member not assigned government quarters.	Yes (Without Dependents)
I	With dependents; member assigned inadequate CG-owned family quarters; checkage for rental charge .	Yes
K	With dependents; member assigned inadequate DOD owned family quarters; checkage for rental charge.	Yes
L**	With dependents; member not assigned government quarters.	Yes

(Continued on Next Page)

Block by Block Description of the Personnel Data Information File (PDIF) (cont.)

BAH Code, Continued

A one-character code to indicate the type BAH to which a member is entitled, continued:

Code	MEANING	ENTITLED TO BAH
M	Without dependents; or with spouse in service and no other dependents; member assigned inadequate CG-owned quarters; checkage for rental charge.	Yes (Without Dependents)
N	Without dependents; or with spouse in service and no other dependents; member assigned inadequate DOD-owned quarters; checkage for rental charge	Yes (Without Dependents)
O	BAH, adequate quarters, segments have been closed by the PERSRU. Member failed to verify dependency data.	No
P	BAH Diff rate solely for child support which started on or after 5 DEC 91; member assigned to CG owned single quarters, DOD owned single quarters, (barracks or shipboard birthing).	Yes (BAH Diff)
Q	BAH Diff rate solely for child support which started on or after 5 DEC 91; member assigned to CG single leased quarters.	Yes (BAH Diff)
R	BAH Diff rate solely for child support on or after 5 DEC 91; without dependents living with them and member not assigned government quarters.	Yes (BAH Diff & BAH W/O)
S	With dependents; member drawing BAH at the with dependent rate on 4 DEC 91 due to child support payments, while assigned to single type government quarters on that date. Refer to section 3-D-15, Coast Guard Pay Manual, COMDTINST M7220.29 (series) for exceptions. Input by HRSIC only.	Yes
X	Entitlement to BAH terminated (separation).	No
Y	Entitlement to BAH terminated (departed PCS, no dependents).	No
Z	Entitlement to BAH terminated (BAH with dependents stopped via CG-4170 with no dependents).	No
Blank	Entitlement to BAH has not started (newly accessed).	No

BAH

Begin date of BAH entitlement.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Marriage Code

A one-character alpha code to indicate the member's status .

Code	Meaning	Code	Meaning
A	Annulled	M	Married
D	Divorced	S	Single
I	Interlocutory	W	Widowed
L	Legally Separated	Blank	No information available

Spouse AD Code

A one-character/numeric code to indicate the relationship of the spouse.

Code	Meaning	Code	Meaning
1	Married and spouse not in service	6	Member is legally separated from spouse Spouse is on active duty
2	Married and spouse is on active duty	7	Married and spouse in reserve component. (Drilling and IRR)
3	Marriage is in an interlocutory status Spouse is not on active duty	A	Member's most recent marriage ended in annulment
4	Marriage is in an interlocutory status Spouse is on active duty	D	Member's most recent marriage ended in divorce
5	Member is legally separated from spouse Spouse is not on active duty	S	Member has never been married
		W	Member's most recent marriage ended due to death of spouse

Number of Dependents

The number of dependents the member has.

RU Dist OPFAC RU

Member's servicing PERSRU's Operating Facility Number.

Perm Dist OPFAC

Member's permanent unit district OPFAC.

BCN

Billet Control Number, a seven character alpha/numeric code to identify, for officers and enlisted, the specific position held at the member's current permanent unit.

New BCN

A seven character alpha/numeric code to identify, for officers and enlisted, the specific position held at the new duty station.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

OBC

Officer Billet Code, a six character alpha/numeric code to identify, for officers, the specific position held at the officer's current permanent unit.

Cost Center

A five character numeric code indicating which cost center the member is assigned.

Duty Status

A two character alpha/numeric code to indicate the member's present duty status. Codes are divided into three functional groups.

Group 1	At Unit For	An alpha/numeric code to describe the different status types for a member while attached to a given unit.
Group 2	Enroute	A alpha/numeric code to describe the different status types for a member while in transit status between two units.
Group 3	Separation	An alpha code to describe the type of separation for members terminating active Coast Guard service

At Unit For Code	Enroute Code	Reason
–	1A	Duty at first unit following enlistment or entry on active duty
D1	2D	Duty at permanent duty station
D3	4D	Assigned temporary duty at a unit
D5	6D	Away on temporary additional duty at another unit
T1	2T	Permanent duty for instruction
T3	4T	Assigned temporary duty for instruction at unit
T5	6T	Away on temporary additional duty for instruction at another unity
C1	2C	Permanent duty for confinement/disciplinary action
C3	4C	Assigned temporary duty for confinement/disciplinary action at another unit
C5	6C	Away on temporary additional duty for confinement/disciplinary action at another unit
R3	4R	Home awaiting disciplinary action
M1	2M	Permanent duty for treatment/hospitalization
M3	4M	Assigned temporary duty for treatment/hospitalization at unit
M5	6M	Away on temporary additional duty for treatment/hospitalization at another unit
M7	–	Reserve disabled member under notice of eligibility
F3	4F	Temporary duty for further assignment
P5	6P	Away for permissive orders
S3	4S	Temporary duty for separation
–	2S	Permanent duty for separation

(Continued on Next Page)

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Duty Status, Continued

A two character alpha/numeric code to indicate the member's present duty status. Codes are divided into three functional groups, continued:

At Unit For Code	Enroute Code	Reason
A5	–	Unauthorized absence
H3	4H	Home awaiting action of physical evaluation board
W5	6W	TAD winter duty

Station

Date member reported to current unit.

Rotation

This is the date the member is eligible for transfer from his/her permanent duty station.

Dest Dist. OPFAC RU

If member is PCS enroute to a new duty station, this would be the member's new District, OPFAC, and RU.

EstArrivl

The estimated date the member will arrive PCS at his/her new unit.

Pay Base Date

This is the constructive date of entry for pay purposes (includes active and inactive service). For members in a continuous military status, this date will be the same as the date enlisted or accepted an appointment unless there is prior service, break in service, or deductible time.

Active Duty Base Date

The constructive date of cumulative active service (will be the date of commission/enlistment for members with no prior military service, breaks in service, or deductible time).

Original CG Enl

The date which the member first enlisted in the Coast Guard or Coast Guard Reserve. This field was not initialized and will not be set for the members whose first entry into the Coast Guard was earlier than the Fall of 1989.

Military Oblig Incrd

This is the date of the member's initial entry into the Armed Forces.

Military Compl

The date the member meets his/her required military obligation.

Cur Actv Dty

The date the member began current period of active duty.

Expected Term

This is the expected active duty termination date on the member.

Exp Loss

Generally, this is the date a member is expected to be a loss (discharged/retired) from the service.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Effctv Term This is the effective active duty termination date on the member.

Total Ded Time This is the cumulative number of days the member's enlistment has been extended due to disciplinary action, lost time, etc.

Expected Good Cond Dt This is what the system currently has in the SDA II system on the member. If incorrect then this date can be changed in the locally created data on miscellaneous screen II of the SDA II system maintained by the PERSRU.

Enlist This is the date the member's current enlistment or reenlistment began.

Enl Length The number of years for which the member last enlisted or re-enlisted.

Effctv Loss The date on which the member's account is no longer maintained in PMIS/JUMPS.

Citzn Code A one character numeric code to identify a member's citizenship status.

Code	Meaning
1	United States citizen
2	Naturalized United States citizen.
3	Other

Birth City & St Member's birth city and state.

Entry City & St City and state of where member entered into CG.

Scrty Auth & Dt A one-character alpha/numeric code to indicate the level of security clearance at the member's current unit and the most recent security clearance date .

Code	Meaning
A	No clearance - investigation reopened
B	SCI denied - ineligible for clearance
C	Confidential
D	Clearance denied
E	Interim Confidential
F	SCI revoked - ineligible for clearance

(Continued on Next Page)

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Scrty Auth & Dt, Continued

A one-character alpha/numeric code to indicate the level of security clearance at the member's current unit and the most recent security clearance date, continued:

Code	Meaning
G	Secret - SCI denied
H	Secret - SCI revoked
I	Clearance pending - investigation reopened
J	No clearance required - file created
K	Eligible for SCI w/waiver
L	Restricted to non - sensitive duties - not eligible for sensitive duties
M	Top Secret only - SCI revoked
N	Top Secret only - SCI denied
O	Interim Secret
P	Interim Top Secret
Q	No clearance/access required - favorable investigation
R	Clearance revoked
S	Secret
T	Top Secret
U	Interim SCI
V	DCID 1/14 eligible
W	Top Secret - SCI requires ajudication
X	Action pending
Y	Pending final adjudication/access suspended
Z	Adjudicative action incomplete due to loss of jurisdiction
1	LAA Confidential
2	LAA Secret
3	pending reply to Letter of Intent/Statement of Reasons
4	Clearance administratively withdrawn
5	Position of trust (no clearance required)
6	SCI denied (no clearance determination)
7	SCI revoked (no clearance determination)

Scrty Invest Type & Dt

A one-character alpha/numeric code to indicate the type of security investigation and when investigation was completed.

Code	Meaning
1	Entrance National Agency Check (ENTNAC)
2	National Agency Check
3	NAC plus written inquiries (NACI)
4	Background Investigation (BI)
5	Special background investigation (SBI)
6*	NAC plus 10 years service (obsolete)
7	NAC plus Special investigative Inquiry (SII)

Continued on Next Page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Scrty Invest Type & Dt, Continued

A one-character alpha/numeric code to indicate the type of security investigation and when investigation was completed, continued:

Code	Meaning
8	ENTNAC plus SII
9*	Interview oriented BI (IBI)
0	Single Scope Background Investigation (SSBI)
A*	Expanded NAC
B	Local Records Check (LRC) plus NACI requested
C	NACI requested
D	NAC (or NACI) plus BI or IBI requested
E	NAC plus SBI requested
F	BI/IBI (10 year scope)
G	Periodic reinvestigation (PR) or BI/IBI
H*	NAC plus partial SBI
I*	Character Investigation (IRS)
J	PR or SBI
K*	Limited BI (LBI) (OPM)
L*	Minimum BI (MBI) (OPM)
M	SBI plus current NAC
N	NACI plus current NAC
O*	SII
P	IBI/BI plus current NAC
Q*	MBI plus current NAC
R*	LBI plus current NAC
S	SBI plus current BI/IBI
T	IBI/BI requested
U	Other
V	SBI requested
W	Local Records Check
X*	MBI - expanded
Y*	LBI - Expanded
Z	NACI plus SII
#	Secret PR

* Periodic reinvestigation - Secret

Scrty Elig Type

A one-character alpha/numeric code to indicate the level of security clearance investigated/adjudicated by TASCAF.

Code	Meaning
A	No clearance - investigation reopened
B	SCI denied - ineligible for clearance
C	Confidential
D	Clearance denied
E	Interim Confidential

Continued on Next Page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Scrty Elig Type, Continued

A one-character alpha/numeric code to indicate the level of security clearance investigated/adjudicated by TASCAF, continued:

Code	Meaning
F	SCI revoked - ineligible for clearance
G	Secret - SCI denied
H	Secret - SCI revoked
I	Clearance pending - investigation reopened
J	No clearance required - file created
K	Eligible for SCI w/waiver
L	Restricted to non - sensitive duties - not eligible for sensitive duties
M	Top Secret only - SCI revoked
N	Top Secret only - SCI denied
O	Interim Secret
P	Interim Top Secret
Q	No clearance/access required - favorable investigation
R	Clearance revoked
S	Secret
T	Top Secret
U	Interim SCI
V	DCID 1/14 eligible
W	Top Secret - SCI requires ajudication
X	Action pending
Y	Pending final adjudication/access suspended
Z	Adjudicative action incomplete due to loss of jurisdiction
1	LAA Confidential
2	LAA Secret
3	pending reply to Letter of Intent/Statement of Reasons
4	Clearance administratively withdrawn
5	Position of trust (no clearance required)
6	SCI denied (no clearance determination)
7	SCI revoked (no clearance determination)

Frame

Member's frame size.

Wght

This is the last date the system has on which the member was weighed.

Wght Over

This is the amount of overweight the member is. Note: Need to ensure that if member meets his/her weight requirements, that another transaction be completed to show this.

Extension information P176

The effective retention date on the member.

Effective date

This is the date the extension becomes effective.

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Original Enl Exp Date

This is the termination date prior to a period of involuntary retention for the member retained in the service beyond normal expiration of enlistment as reported on a retention transaction (P 176).

# of Ext/Rextens

A one character numeric code to indicate the number of extension or reextension of the member's current enlistment.

Code	Meaning
0	First extension of enlistment (P 154)
1	First reextension of enlistment (P 159)
2	Second reextension of enlistment (P 159)
3	Third reextension of enlistment (P 159)
4	Fourth reextension of enlistment (P 159)
5	Fifth reextension of enlistment (P 159)
6	Sixth reextension of enlistment (P 159)
Blank	Not applicable

1st Ext Term

The number of years and months an enlistment is extended.

Total Ext Length

For reenlistment bonus purposes, the total number of years, months and days, the member has extended or reextended his/her enlistment, even though no bonus is paid. This is a cumulative number up to a maximum of six years as long as the member is on the same enlistment.

Reextension Date

This is the date the reextension becomes effective.

Reextension Length

This is number of years and months of the reextension.

Battery Test Data Date

This is the effective date an enlisted member's basic battery scores were initially taken.

Arithmatic Reasoning

What score the member received on this portion of the test.

Paragraph Comp

What score the member received on this portion of the test.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Numerical Oper What score the member received on this portion of the test.

General Science What score the member received on this portion of the test.

World Knowledge What score the member received on this portion of the test.

Coding Speed What score the member received on this portion of the test.

Auto & Shop What score the member received on this portion of the test.

Math Knowledge What score the member received on this portion of the test.

Mechanical Computation What score the member received on this portion of the test.

Electrical Information What score the member received on this portion of the test.

Verbal What score the member received on this portion of the test.

Edu Cd A one character alpha/numeric code indicating, in a member's education, the highest grade completed and or obtained.

Code	Level
1	Grammar School - Non-GED
2	1 year of high school - Non-GED
3	2 years of high school - Non-GED
4	3 or 4 years of high school - Non GED
5	High School graduate
6	1 year of college
7	2 years of college
8	3 or 4 years of college
A	Associate Degree
B	College graduate (BS or BA degree)
D	Doctorate degree (PHD/DCS)
M	Master degree or equivalent not indicated elsewhere
X	Certificate of Completion/ Attendancce
Y	Graduate Equivalency Diploma (GED)

Continued on Next Page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Edu Cd, Continued

A one character alpha/numeric code indicating, in a member's education, the highest grade completed and or obtained, continued:

Code	**Level**
*C	Professional Certification (e. g., CPA, CPM)
G	Graduate work of one year or more, without degree
*P	Professional Degree (e.g., Navel Architect)
*T	Other non-degree professional training not covered

* **NOT** an "Educational Level Code". These four codes are ONLY for "Degree Information"

Exam Board OPFAC

This seven digit district/unit OPFAC number identifies where the next servicewide exam will be administered.

Qual Test

This is the enlisted initial qualification test name.

Score

This is the enlisted initial qualification test score. Which is the score of test taken at time of enlistment.

SWE

This is the servicewide exam specialty. The enlisted rank and rate to which the commanding officer has approved a lateral change in rating for paygrades E4 - E6, or for a non-rated member to participate in the exam for advancement to E-4.

CWO Spec

The CWO Specialty for which the commanding officer is recommending the candidate for the board.

Rating	**Warrant Specialty**
Aviation Machinist's Mate (AD) Aviation Electrician's Mate (AE) Aviation Structural Mechanic (AM)	Aviation Engineering (AVI)
Musician (MU)	Bandmaster (BNDM)
Boatswain's Mate (BM) Marine Science Technician (MST) Quartermaster (QM) Radarman (RD)	Boatswain (BOSN)
Telecommunications Specialist (TC)	Communications (COMM)
Aviation Electronics Technician (AT) Electronics Technician (ET) Telephone Technician (TT)	Electronics (ELC)

Continued on Next Page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

CWO Spec, Continued

The CWO Specialty for which the commanding officer is recommending the candidate for the board, continued:

Rating	Warrant Specialty
Storekeeper (SK) Food Service Specialist (FS)	Finance and Supply (F & S)
Damage Controlman (DC) Aviation Survivalman (ASM)	Material Maintenance (MAT)
Health Services Technician (HS)	Medical Administration (MED)
Electrician's Mate (EM) Machinery Technician (MK)	Naval Engineering (ENG)
Yeoman (YN) Data Processing Technician (DP) - (Reserve Rating)	Personnel Administration (PERS)
Fire Fighter (FI) (Reserve Rating) Investigator (IV) (Reserve Rating) Port Securityman (PS) (Reserve Rating)	Port Safety and Security (PSS)
Photojournalist (PA)	Public Information (INF)
Fire Control Technician (FT) Gunner's Mate (GM)	Weapons (WEPS)

OAR Score

The score the member last achieved on the Officer Aptitude Rating (OAR) Test.

CWO OAR

The date the member last took the Officer Aptitude Rating (OAR) test .

Phys Exam

The date the member was last physically examined.

Phys Exam Cd

A one-character alpha code to indicate the result of the member's last physical condition.

For regular Coast Guard Members:

Code	Meaning
A	Qualified by periodic exam
D	Qualified for discharge/retirement/RELAD
N	Not Qualified
O	Qualified for overseas/sea duty assignment
T	Temporarily Disqualified

For reserve Coast Guard members:

Code	Meaning
N	Not Qualified
P	Permanent Waiver
Q	Qualified
W	Temporary Waiver

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Med Review	This is the date the Medical Admin Reviewer acted upon the physical exam.
Diver Lapse	This is the date on which a member's diving qualification expires. If a member does not requalify, dive pay will automatically terminate this date.
Reserve CAT	Indicates the training and pay category to which the reserve member has been assigned.
Cumltv Sea	This is the amount of cumulative sea time the member has.
Sea Pay Prem Date	This is the date the member became eligible for Career Sea pay premium and can be updated in the Member's Locally Created Data transaction on Miscellaneous Menu II in SDA II, a system maintained by the PERSRU.
Medal/Award code	A two-character alpha code to indicate the type of award.
Medal/Award name	The name of the award.
Award date	The date the award was approved.
Qualification code	A two-character alpha/numeric code to identify specific qualifications held by enlisted personnel.
Effective	The date the member became qualified for the qualification code.
School Code	A six-character numeric code to indicate the service school completed by the member.
Course	A description of the school completed by the member.
Completed	The date the member completed the school .
Language	This shows what foreign languages the member can speak or write.
Training Data	No information is provided in this field.
First name of dependent/non-dependent	Self Explanatory

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Last name of dependent/non-dependent	Self Explanatory
Middle initial of dependent/non-dependent	Self Explanatory
Birth date of dependent/non-dependent	Self Explanatory
Relationship	The dependent's/non-dependent's relationship to the member.
BAH date	When the member became BAH eligible dependent.
4170 Dt	This is the date of the last CG-4170A that was input into the SDA II system on the member.
Home address	This is the member's mailing address.
HORAd	This is the member's home of record (city and state).
Ltax	This is the member's legal state of residency (city and state).
Home phone number	This is the member's home phone number. This can be updated in the member's locally created data transaction on Miscellaneous Menu II of SDA II, a system maintained by the PERSRU.
Work	This is the member's work phone number. This can be updated in the member's locally created data transaction on Miscellaneous Menu II of SDA II, a system maintained by the PERSRU.

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Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

The following is a list of fields that is reserve unique and will only show up on the PDIF if the member is a reservist:

Category

This uses a single alpha code for determination of member's Reservist classification.

When the member is in the	The code is:
Ready reserve	R
Standby Reserve (Active Status)	S
Standby Reserve (Inactive Status)	I

Class

This uses a single alpha code which identifies the class to which an individual is assigned.

When the member is a(n):	The code is:
Inactive duty officer, within their 8 year obligation	I
Prior service CG enlisted, within their 8 year obligation	J
Enlisted member who is a student and performs a split phase Initial Active Duty Training (IADT)	K
Student participating in the Maritime Academy Reserve training Program (MARTP)	M
Member with service obligation, not in another class	N
Enlisted member, required to attend recruit training and class " A" school during one IADT phase	P
Member without a statutory obligation	Q
Enlisted member, completes 4 months IADT (currently not used)	S
Enlisted member, non-prior service direct petty officer	X
Enlisted member, attends recruit training and 30 days OJT while on IADT	Y
Enlisted member recruited as a **P** or **K** but failed to complete IADT. Not used after 1996.	L
Enlisted member, completes 4 months IADT (currently not used)	S

Train/Pay/Cat

This uses a single character alpha designation of a Reservist's training requirements and pay entitlements **.**
Selected Reserve

Train/Pay Cat	Comprised of
A	Includes most SELRES in a pay status
B	IMA with Selective Service System (reimburseable)
C	Previously used for RKs in Interphase. No longer in use.
E	Reservists with drill obligation without access to IDT unit
F	RPs, RKs, & RLs on IADT

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Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

Train/Pay/Cat, Continued

This uses a single character alpha designation of a Reservist's training requirements and pay entitlements, continued:

Selected Reserve, Continued

Train/Pay Cat	Comprised of
M	Reservists currently mobilized, but expected to return to drilling status upon RELAD
P	RPs, RKs, & RY s recruited but not yet reported to IADT

Individual Ready Reserve

Train/Pay Cat	Comprised of
D	Reserve Flag Officers
H	Members with no requirement to drill
J	Reservists who have enlisted to attend OCS but have not reported

Standby Reserve

Train/Pay/Cat	Comprised of
G	Key Federal employees in the Standby Reserve (Active Status)
N	All others in the Standby Reserve (Active Status)
I	Standby Reserve (Inactive Status)

Train/Pay/Cat (Date)

This is the date a member is assigned to an individual category for pay purposes.

Train Rating

This identifies members who are authorized a lateral change in rate and for non-rates authorized to strike for a rating.

Drill Group

This is the particular group a member is assigned.

Drill Oblig

This is the date a member of the Reserve no longer is required to perform inactive duty drills.

Paid Drills

This figure gives the number of paid drills that a member has earned during an anniversary year.

Non paid

This figure gives the number of non-paid drills that a member has earned.

Continued on next page

Block by Block Description of the Personnel Data Information File (PDIF) (cont'd)

MGIB Start	This is the start date for inclusion of the Montgomery GI Bill.
MGIB Stop	This is the stop date for the Montgomery GI Bill.
MGIB Stat	This is a one character code that determines the present status of a member in the MGIB program.
MGIB Oblig	This is the number of months obligated remaining upon termination or suspension of MGIB entitlement.
MGIB Penal	This is the penalty status code, penalty status at the time of termination or suspension of MGIB entitlement.
Prev Train/Pay	This is the category a member was previously attached.
Total Paid Duty	This is the amount of pay accruing to the member.
Anniversary	This refers to a member who entered reserve service after 30 June 1949 or whose reserve service was broken after that date, the anniversary year begins on the date of entry or reentry to the day preceding the anniversary of entry or reentry.
Pay/Allow Accru	This is the effective date of accrual for a member's current pay/allow category.
Total points	This figure refers to the amount of points that a reservist has earned. Fifty points must be earned in an anniversary year for that year to be considered satisfactory for computation of service or retirement.
Initial Entry	This is the date of the member's entry into the Reserve.
Active duty	This field states the number of years of active service. Active duty is full time duty in the active military service of the United States.
20yr Ltr	This is the date of the submission of the retirement letter for a member.
Civ Occ Cd	This provides information on general and specific skills which could be of value to the Coast Guard.
Home Duty	This is the effective date of the transaction for a member being assigned to the home duty station, i. e. the OPFAC a member would be assigned upon completion of active duty.

Personnel Casualty Report Message

MESSAGE ROUTING FOR ACTIVE DUTY AND RESERVE MEMBERS, OR DEPENDENTS OF ACTIVE DUTY MEMBERS:

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO CCGDNUMBER ANYWHERE US (district where next of kin resides)
COMDT COGARD WASHINGTON DC//G-WPM//
INFO COGARD HRSIC TOPEKA KS
INFO COMCOGARD PERSCOM WASHINGTON DC//EPM or OPM//
FHTNC NORFOLK VA (Fleet Home Town News Center)
CCGDNUMBER ANYWHERE US (district where member's unit is located, if different from "To" line)
CCGDNUMBER ANYWHERE US (district where unit sending this msg is located, if different from above)
COGARD UNIT ANYWHERE US (member's unit, if different than "From" line)
COGARD MLC ANYWHERE US (if member's unit was a MLC unit)

MESSAGE ROUTING FOR RETIRED MEMBERS, OR MEMBERS WHO DIE WITHIN 120 DAYS OF SEPARATION

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COGARD HRSIC TOPEKA KS
INFO COMDT COGARD WASHINGTON DC//G-WPM//
FHTNC NORFOLK VA (Fleet Home Town News Center)

ACCT CGW2GARC
BT
UNCLAS //N01770//
SUBJ: PERSONNEL CASUALTY REPORT
1. THE FOLLOWING INFO IS PROVIDED:

ALPHA. Name. Indicate member's full name, rank/rate, SSN, and branch of service. In the case of death of an active duty member's dependent, indicate dependent's full name and relationship to member, and give member's identifying information.

BRAVO. Status. Indicate status, e.g., active duty, dependent, active duty for training, retired, absentee since, etc. [In the case of reserve members, indicate whether the member was on active duty for training or inactive duty for training, and the period of training authorized including hour and date. If the casualty occurred en route to or from training, indicate the time of the member's departure, scheduled arrival time, method of travel, itinerary, and immediate cause of death. Express/Overnight mail a complete copy of the reservist's order immediately to Commandant (G-WPM).]

Continued on next page

Personnel Casualty Report Message, Continued

CHARLIE. Type of Casualty. Indicate whether killed in action, died of wounds or other cause, missing, or the prognosis in case of illness or injury. [Do not use indefinite statements such as "lost overboard" or "missing and presumed dead". If it cannot be determined if member is deceased, see Article 11-A-4, Coast Guard Personnel Manual, COMDTINST M1000.6 (series). When applicable, state how identification of remains was established.]

DELTA. Date, Time, Place, Circumstances, and Cause. [Use local time. If the casualty occurred at sea or at a remote area, state latitude and longitude, unless security precludes. Give concise but ample description to provide means for explaining the casualty to the family and for processing survivor benefits. If the member is missing, include a statement of the status of the search or the impracticability of conducting a search. If death was caused from injuries, state whether sustained in an automobile accident, plane accident, or other cause. If possible, give brief additional information which would indicate whether or not the injuries were incurred in the line of duty, e.g., accidental electrocution while engaged in repair work aboard ship. If death was caused by gunshot wound, indicate whether sustained accidentally or apparently intentionally self-inflicted. If death resulted from drowning, indicate whether due to falling overboard, recreational swimming, etc. If death resulted from flight in a Coast Guard aircraft, report circumstances as follows: status of individual, e.g., pilot, crewmember, passenger; model of aircraft; and purpose and type of flight, e.g., whether "operational" or "other than operational". Whenever a determination of the cause of death is delayed pending an autopsy or toxicological examination, the finding shall be furnished by supplemental message as soon as possible.]

ECHO. Location and Disposition of Remains. [Give complete name, address, and phone number of morgue or funeral establishment where remains are located. If remains are to be transferred to another establishment, give name, address, and phone number of such establishment, when transfer will be made, and any special disposition instructions the next of kin should know. If remains were not recovered, give the status or the search.]

FOXTROT. Full Name, Address, and Relationship of Next of Kin. [Next of Kin information is found on the BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A). If dependents are injured or killed in the same accident, state their present whereabouts and condition if applicable.]

Continued on next page

Personnel Casualty Report Message, Continued

GOLF. Notification of Next of Kin. Enter "YES" or "NO" to indicate whether primary and secondary next of kin named on the member's BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) have been officially notified. [If notification has been made, state date and local time of contact. If notification has not been made, advise what action is being taken to notify next of kin.]

HOTEL. Board of Investigation. Enter "YES" or "NO" to indicate whether a board of investigation will be convened.

INDIA. BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A). Indicate date of latest BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) executed by member.

JULIETT. Beneficiary for Death Gratuity. Provide name and address of designated beneficiary for the 6 months death gratuity, as shown on the member's current BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A).

KILO. Payment of Death Gratuity. Indicate whether or not death gratuity will be paid to the spouse in accordance with Article 18-A-4, Coast Guard Personnel Manual, COMDTINST M1000.6 (series). If death gratuity is paid, state amount and date payment effected. [If for any reason payment is not made to the spouse, indicate reason.]

LIMA. Servicemembers' Group Life Insurance (SGLI). Indicate whether the member is covered by SGLI, the amount of coverage, and the beneficiary information listed on the member's most recent VA Form SGLV-8286. Also indicate whether the member has been in an AWOL status for 31 days or more at any time since 29 September 1965.

MIKE. Beneficiary for Pay and Allowances. Indicate name and address of beneficiary designated by the member on BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A) for unpaid pay and allowances.

Continued on next page

Personnel Casualty Report Message, Continued

NOVEMBER. Predeceased or Prior Spouse Cases. If the member was married, and either (1) the member's spouse predeceased the member, or
(2) the member's spouse died in the same accident as the member, or
(3) the member is divorced:
indicate the member's current marital status, the name of the current spouse, the name of the former spouse(s), and the name of the member's current next of kin.

OSCAR. Identification of a Potential Third Party Claim. If the member or the member's dependents are injured and receive medical care at Government expense or through CHAMPUS, and it appears that a third party is at fault, identify the third party involved.

AWARD CODES (Sorted By Name) (Sorted By Name), Continued

AWARD	CODE	POINT
Army Reserve Components Achievement	RX	0
Army Service Ribbon	QM	0
Asiatic-Pacific Campaign Medal	QD	0
Atlantic War Zone Bar	RR	0
Bicentennial Unit Commendation	MJ	0
Bronze Star Medal	CA	5
China Service Medal	NF	0
Coast Guard Achievement Medal	HC	2
Coast Guard Arctic Service Medal	NL	0
Coast Guard Basic Training Honor Graduate	NS	0
Coast Guard Commendation Medal	FC	3
Coast Guard Company Commander Insignia	CC	0
Coast Guard Distinguished Service Medal	BE	6
Coast Guard "E" Ribbon	NB	0
Coast Guard Expert Pistol	PM	0
Coast Guard Expert Rifle	PL	0
Coast Guard Good Conduct Medal	SD	1
Coast Guard Marksman Pistol	MN	0
Coast Guard Marksman Rifle	ML	0
Coast Guard Medal	BN	6
Coast Guard Meritorious Unit Commendation	MB	0
Coast Guard Sharpshooter Rifle	MK	0
Coast Guard Sharpshooter Pistol	MM	0
*Coast Guard Reserve Good Conduct Medal (Creditable for Reserve SWE Only.)	SE	1
Coast Guard Recruiting Service Ribbon	RC	0
Coast Guard Restricted Duty	NR	0
Coast Guard Special Operations Service	NQ	0
Coast Guard Unit Commendation	MA	0
Combat Action Ribbon	JA	1
Commandant's Award For Superior Achievement (DOT Bronze)	HA	2
Commandant's Letter of Commendation Ribbon	NA	1
Defense Distinguished Service Medal	BD	6
Defense Meritorious Service Medal	DA	4
Defense Superior Service Medal	BK	6

Continued on next page

AWARD CODES (Sorted By Name), Continued

AWARD	CODE	POINT
Distinguished Flying Cross	BM	6
Distinguished Service Cross	BB	6
Euro-African-Mid Eastern Campaign	QE	0
Fleet Navy-Marine Force Ribbon	QK	0
Gold Lifesaving Medal	BR	6
Humanitarian Service Medal	NP	0
Inter-American Defense Board Medal	PJ	0
Joint Meritorious Unit Award	MG	0
Joint Service Commendation Medal	FB	3
Joint Service Achievement Medal	HB	2
Korean Service Medal	NJ	0
Kuwait Liberation Medal	KL	0
Kuwait Liberation Medal (Saudi Arabia)	NW	0
Legion Of Merit	BL	6
Marine Good Conduct	PV	0
Marine Corps Expeditionary Medal	PX	0
MED-Middle East War Zone Bar	RS	0
Medal of Honor	AA	10
Medal for Humane Action	QH	0
Meritorious Service Medal	DB	4
Meritorious Team Commendation Ribbon	MT	0
Military Outstanding Volunteer Service Medal	MV	0
Multinational Force and Observers Medal	PH	0
National Defense Service Medal	NH	0
NATO Medal	UN	0
Navy Achievement Medal	HD	2
Navy Arctic Service Ribbon	NY	0
Navy Commendation Medal	FD	3
Navy Cross	BA	6
Navy Distinguished Service Medal	BF	6
Navy Distinguished Marksman	RF	0
Navy Distinguished Pistol Shot	RG	0
Navy "E" Ribbon	NU	0
Navy Expert Rifleman	RH	0

Continued on next page

AWARD CODES (Sorted by Code)

CODE	AWARD	POINT
AA	Medal of Honor	10
AF	Armed Forces Service Medal	0
BA	Navy Cross	6
BB	Distinguished Service Cross	6
BC	Air Force Cross	6
BD	Defense Distinguished Service Medal	6
BE	Coast Guard Distinguished Service Medal	6
BF	Navy Distinguished Service Medal	6
BG	Army Distinguished Service Medal	6
BH	Air Force Distinguished Service Medal	6
BI	Silver Star Medal	6
BJ	Secretary's Award for Outstanding Achievement (DOT Gold Medal)	6
BK	Defense Superior Service Medal	6
BL	Legion of Merit	6
BM	Distinguished Flying Cross	6
BN	Coast Guard Medal	6
BO	Navy-Marine Corps Medal	6
BP	Soldier's Medal	6
BQ	Airman's Medal	6
BR	Gold Lifesaving Medal	6
CA	Bronze Star Medal	5
CC	Coast Guard Company Commander Insignia	0
DA	Defense Meritorious Service Medal	4
DB	Meritorious Service Medal	4
EA	Air Medal	4
FA	Secretary's Award For Meritorious Achievement (DOT Gold Medal)	3
FB	Joint Service Commendation Medal	3
FC	Coast Guard Commendation Medal	3
FD	Navy Commendation Medal	3
FE	Army Commendation Medal	3
FF	Air Force Commendation Medal	3
GA	Silver Lifesaving Medal	4
HA	Commandant's Award For Superior Achievement (DOT Bronze)	2
HB	Joint Service Achievement Medal	2

Continued on next page

AWARD CODES (Sorted by Code), Continued

CODE	AWARD	POINT
HC	Coast Guard Achievement Medal	2
HD	Navy Achievement Medal	2
HE	Army Achievement Medal	2
HF	Air Force Achievement Medal	2
IA	Purple Heart	4
JA	Combat Action Ribbon	1
KL	Kuwait Liberation Medal	0
KM	Transportation Distinguished Service Medal	0
MA	Coast Guard Unit Commendation	0
MB	Coast Guard Meritorious Unit Commendation	0
MC	Navy Unit Commendation	0
MD	Navy Meritorious Unit Commendation	0
ME	Army Meritorious Unit Commendation	0
MF	Presidential Unit Citation	0
MG	Joint Meritorious Unit Award	0
MH	Armed Forces Reserve Medal	0
MJ	Bicentennial Unit Commendation	0
MK	CG Sharpshooter Rifle	0
ML	CG Marksman Rifle	0
MM	CG Sharpshooter Pistol	0
MN	CG Marksman Pistol	0
MP	Naval Reserve Sea Service Ribbon	0
MT	Meritorious Team Commendation Ribbon	0
MV	Military Outstanding Volunteer Service Medal	0
NA	Commandant's Letter of Commendation Ribbon	1
NB	Coast Guard "E" Ribbon	0
NC	POW Medal	0
ND	Naval Reserve Meritorious Medal	0
NE	Navy Expeditionary Medal	0
NF	China Service Medal	0
NG	Navy Occupational Service Medal	0
NH	National Defense Service Medal	0
NJ	Koran Service Medal	0
NK	Antarctic Service Medal	0

Continued on next page

COMMENT FORM

The Human Resources Service and Information Center needs your input and feedback concerning this Manual. If there are any areas that are not clear, complete or accurate, additional procedures that should be included, or any other recommendations you may have for improvement, HRSIC would like to know about them. Just copy this form, write your suggestions in the space below, and mail to HRSIC (PRC). Or simply E-mail your suggestion to PUBS/HRSIC.

COMMENTS / RECOMMENDATIONS

For details, you can contact me at the following address and phone number:

Date:_______________ Phone No: ___________________________

Name and Rate/Rank: ____

Unit: ____

REPRODUCE LOCALLY

Retirement Package

Purpose

Your retired pay account is not automatically transferred from active duty or reserve. To establish your retired pay account, **the necessary forms in this appendix must be fully completed, signed, witnessed and forwarded to HRSIC (RAS).**

Notes

- The forms in this appendix should be reproduced locally.
- The forms may be typed or printed neatly in ink.
- These forms should be submitted as soon as possible, but not later than 30 days prior to retirement.
- If you have any questions after you read these instructions concerning these forms or your upcoming retirement, please call HRSIC (RAS) at **785-**357-3415 or 1-800-772-USCG.
- These completed forms should be mailed to:

COMMANDING OFFICER (RAS)
U.S. COAST GUARD HUMAN RESOURCES
SERVICE & INFORMATION CENTER
444 S.E. QUINCY STREET
TOPEKA, KS 66683-3591

Continued on next page

Retirement Package, Continued

First Payment

Your first retirement payment (direct deposit or check, if authorized) will be delivered according to this schedule.

- If you retire on the first day of th e month and HRSIC receives your retirement documents on time, you will receive your first retired payment on the first working day of the month following your retirement, and each month thereafter.

Example: If you retire on 1 July, you will get your first retired payment the first working day of August.

- If you retire on a day other than the first day of the month and HRSIC receives your retirement documents on time, you will receive a payment for the partial month of retirement within 10 days after the first of the following month. Each monthly payment thereafter will be received on the first working day of the month.

Example: If you retire on 10 July, your partial payment for 10-31 July should be received not later than 10 August. Your first regular payment should be received on the first working day in September.

Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) for Active Duty Members

Introduction

Information you provide on the Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) is used to:

- Establish your retired pay account,
- record your Survivor Benefit Plan Election (SBP), and to
- record your spouse's concurrence with the SBP election.

A blank CG HRSIC-4700 is included in this appendix as exhibit 1.

Note: This form should only be used for members who are on active duty.

Instructions for completion of the CG HRSIC-4700

Most items on the CG HRSIC-4700 are self explanatory. Detailed information required for making an SBP election can be obtained by attending a Military Pre-Retirement seminar or by reading chapter 3 of "Your Guide to Retirement", HRSICINST M1800.5 (series), which is mailed to each perspective retiree by HRSIC (RAS) upon notification of an approved retirement request.

General instruction for the completion of the form are listed below. If you need any assistance or have any questions regarding the CG HRSIC-4700, please call HRSIC (RAS) at 785-357-3415 or at 1-800-772-8724.

Section I, Identification and Address

Fill out this section completely.

Item 2 - Provide both your rank and rate (e.g., CDR/O5, MK1/E-6).

Item 5 - Enter the mailing address desired for Leave and Earnings Statements, Federal Tax Withholding Statements, and the Retiree Newsletter.

Continued on next page

Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) for Active Duty Members, Continued

Section II, Pay Delivery

Delivery of your retired pay by direct deposit is mandatory (Public Law 103-356). Waivers may be granted when it is determined it would be in the best interest of both the individual and the Coast Guard.

- **Presently on Direct Deposit.** If you receive your active duty pay by direct deposit and desire to have your retired pay deposited into the same account/financial institution, write on your LES, " **CONTINUE DIRECT DEPOSIT**". Please see exhibit 4 for an example of how to annotate the LES. (Your LES is also used to annotate continuation of allotments as discussed in the next section of this appendix.)

To request a waiver of mandatory direct deposit:

- Send a letter to HRSIC (RAS) stating the reason(s) you cannot participate.

- Complete and attach a CG HRSIC-2015, Pay Delivery Worksheet, from Enclosure (1) of this manual.

Section III, Tax Withholding Information

Item 13 - If 10 or more exemptions are claimed, you must submit the current year's IRS Form W-4 at the beginning of each year.

Item 14 - Additional Federal Tax Withholding must be in whole dollar amounts.

Item 15 - If exempt status is claimed you must submit the current year's IRS Form W-4 at the beginning of each year.

Continued on next page

Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) for Active Duty Members, Continued

Section III, Tax Withholding Information (continued)

Item 16 - The following states have a state tax agreement for state income taxes as of 1 January 1998.

Arizona	Maine	Oklahoma
Arkansas	Maryland	Oregon
California	Minnesota	Rhode Island
Colorado	Missouri	South Carolina
Connecticut	Montana	Utah
Delaware	Nebraska	Vermont
Dist of Columbia	New Jersey	Virginia
Georgia	New Mexico	West Virginia
Idaho	North Carolina	Wisconsin
Indiana	North Dakota	
Iowa	Ohio	

Section IV, Designation of Beneficiaries for Unpaid Retired Pay

This information is used to establish your beneficiaries for any unpaid retired pay due to you at the time of your death.

Item 18 - Enter the name(s) of those you designate to receive unpaid retired pay. Include their relationship to you, their address and phone number. If more than one person is entered, indicate the percentage of your pay each is to receive.

- The share must equal 100%.
- You cannot designate a trust to receive your final retired pay due, but you can designate the trustee as the final pay recipient, for example, "John W. Doe, Trustee."
- If your beneficiary changes notify HRSIC (RAS) immediately.

Continued on next page

Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) for Active Duty Members, Continued

Section V, Certification Data for Payment of Retired Personnel

This information is used to identify conditions that may affect your retired pay.

Dual Compensation. If you are a regular commissioned officer or warrant officer, you are subject to a reduction in your retired pay if you become employed by the federal government.

Level V. All members (officer, enlisted, and reserve) may be subject to a reduction in their retired pay if they become employed by the federal government and their combined federal salary and retired pay exceeds Level V of the executive schedule.

- Failure to notify HRSIC (RAS) of your federal employment will result in interest and administrative fees being assessed on any overpayments discovered later through interagency computer matching.

- Retirees who go to work for a foreign government, or a company, educational institution, or other concern controlled/owned in whole or in part by a foreign government, forfeit their retired pay unless they obtain prior employment approval from the Departments of State and Transportation.

Section VI, Survivor Benefit Plan Election

The Survivor Benefit Plan will provide a monthly income for a retiree's survivors after his/her death. If a retiree does not elect SBP coverage, upon his/her death, survivors will not be entitled to any money from the Coast Guard.

The retiree must elect whether to participate in SBP prior to actual retirement. The retiree must also select which survivors will be covered.

Continued on next page

Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG HRSIC-4700) for Active Duty Members, Continued

Section VI, Survivor Benefit Plan Election (continued)

Detailed information required for making an SBP election can be obtained by attending a Military Pre-Retirement seminar or by reading chapter 3 of "Your Guide to Retirement"' HRSICINST M1800.5 (series), which is mailed to each perspective retiree by HRSIC (RAS) upon notification of an approved retirement request.

Item 33 - If child is disabled attach a medical statement, signed by a physician, indicating when disability started and if disability is permanent or temporary.

Note: All eligible dependents must be listed regardless of election .

Section VII, SBP Spousal Concurrence

Your decision concerning participation in SBP will have a direct impact on your spouse. If you elect not to participate, or to participate at less than the maximum level, your spouse must be notified of your decision and complete this section of the form.

Item 36 - 39 - Your spouse's endorsement must be witnessed by someone over the age of 18 who is not a member of your family.

Note: If you and your spouse are not collocated, your commanding officer must send a letter of notification/concurrence to your spouse in accordance with section 3-B-23 (Checklist for Retirement) of the Pay and Personnel Procedures Manual, HRSICINST M1000.2 (series).

Section VIII, Declaration of Service

This section is used to obtain information concerning any prior service you have had which may effect the computation of your retired pay.

- Complete all items that are applicable.
- If you have prior service in a reserve component, attach to the form copies of point statements (or other documentation) which substantiate reserve retirement points you have previously earned.

Section IX, Member's Certification

Item 58-62 - Your signature must be witnessed by someone over the age of 18 who is not a member of your family. **This is required for retired pay to begin.**

Reserve Component Retired Pay Account Worksheet (CG HRSIC-4700/R)

Introduction

Information you provide on the Reserve Component Retired Pay Account Worksheet (CG HRSIC-4700/R) is used to:

- Establish your retired pay account,
- record your Survivor Benefit Plan Election (SBP), and to
- record your spouse's concurrence with the SBP election.

A blank CG HRSIC-4700/R is included in this appendix as Exhibit 2.

Note: This form should be used for reserve members only.

Instructions for completion of the CG HRSIC-4700/R

Most items on the CG HRSIC-4700/R are self explanatory. Detailed information required for making an SBP election can be obtained by attending a Military Pre-Retirement seminar or by reading chapter 3 of "Your Guide to Retirement", HRSICINST M1800.5 (series), which is mailed to each perspective retiree by HRSIC (RAS) upon notification of an approved retirement request.

General instruction for the completion of the form are listed below. If you need any assistance or have any questions regarding the CG HRSIC-4700/R, please call HRSIC (RAS) at 785-357-3415 or at 1-800-772-8724.

Section I, Identification and Address

Fill out this section completely.

Item 2 - Provide both your rank and rate (e.g., CDR/O5, MK1/E-6).

Item 5 - Enter the mailing address desired for Leave and Earnings Statements, Federal Tax Withholding Statements, and the Retiree Newsletter.

Continued on next page

Reserve Component Retired Pay Account Worksheet (CG HRSIC-4700/R), Continued

Section II, Pay Delivery

Delivery of your retired pay by direct deposit is mandatory (Public Law 103-356). Waivers may be granted when it is determined it would be in the best interest of both the individual and the Coast Guard. To request a waiver of mandatory direct deposit:

- Send a letter to HRSIC (RAS) stating the reason(s) you cannot participate.
- Complete and attach a CG HRSIC-2015, Pay Delivery Worksheet, from enclosure (1) of this manual.

Section III, Tax Withholding Information

Item 12 - if 10 or more exemptions are claimed, you must submit the current year's IRS Form W-4 at the beginning of each year.

Item 13 - Additional Federal Tax Withholding must be in whole dollar amounts.

Item 14 - If exempt status is claimed you must submit the current year's IRS Form W-4 at the beginning of each year.

Item 15 - The following states have a state tax agreement for state income taxes as of 1 January 1998:

Arizona	Maine	Oklahoma
Arkansas	Maryland	Oregon
California	Minnesota	Rhode Island
Colorado	Missouri	South Carolina
Connecticut	Montana	Utah
Delaware	Nebraska	Vermont
Dist of Columbia	New Jersey	Virginia
Georgia	New Mexico	West Virginia
Idaho	North Carolina	Wisconsin
Indiana	North Dakota	
Iowa	Ohio	

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Reserve Component Retired Pay Account Worksheet (CG HRSIC-4700/R), Continued

Section IV, Designation of Beneficiaries for Unpaid Retired Pay

This information is used to establish your beneficiaries for any unpaid retired pay due to you at the time of your death.

Item 17 - Enter the name(s) of those you designate to receive unpaid retired pay. Include their relationship to you, their address and phone number. If more than one person is entered, indicate the percentage of your pay each is to receive.

- The share must equal 100%.
- You cannot designate a trust to receive your final retired pay due, but you can designate the trustee as the final pay recipient, for example, “John W. Doe, Trustee.”
- If your beneficiary changes notify HRSIC (RAS) immediately.

Section V, Certification Data for Payment of Retired Personnel

This information is used to identify conditions that may affect your retired pay.

Level V. All members may be subject to a reduction in their retired pay if they are employed by the federal government and their combined federal salary and retired pay exceeds Level V of the executive schedule.

- Failure to notify HRSIC (RAS) of your federal employment will result in interest and administrative fees being assessed on any overpayments discovered later through interagency computer matching.

- Retirees who work for a foreign government, or a company, educational institution, or other concern controlled/owned in whole or in part by a foreign government, forfeit their retired pay unless they obtain prior employment approval from the Departments of State and Transportation.

Continued on next page

Reserve Component Retired Pay Account Worksheet (CG HRSIC-4700/R), Continued

Section VI, Survivor Benefit Plan Election

The Survivor Benefit Plan will provide a monthly income for a retiree's survivors after his/her death. If a retiree does not elect SBP coverage, upon his/her death, survivors will not be entitled to any money from the Coast Guard.

The retiree must elect whether to participate in SBP prior to retirement with pay. The retiree must also select which survivors will be covered.

Detailed information required for making an SBP election can be obtained by attending a military Pre-Retirement seminar or by reading chapter 3 of "Your Guide to Retirement" HRSICINST M1800.5 (series), which is mailed to each perspective retiree by HRSIC (RAS) upon notification of an approved retirement request.

Item 32 - If child is disabled attach a medical statement, signed by a physician, indicating when disability started and if disability is permanent or temporary.

Note: All eligible dependents must be listed regardless of election.

Section VII, SBP Spousal Concurrence

Your decision concerning participation in SBP will have a direct impact on your spouse. If you elect not to participate, or to participate at less than the maximum level, your spouse must be notified of your decision and complete this section of the form.

Item 35 - 38 - Your spouse's endorsement must be witnessed by someone over the age of 18 who is not a member of your family.

Section VIII Member's Certification

Item 52 - 55 - Your signature must be witnessed by someone over the age of 18 who is not a member of your family. **This is required for retired pay to begin.**

Retired Allotment Authorization Form

Introduction

Retired Allotment Authorization Form (CG HRSIC 7221) is an optional form. It may be used to start, stop or change an allotment or bond. All of your allotments will be automatically stopped on the active duty pay system. Any allotments you request be carried forward will be restarted in the retired pay system. The types of allotments authorized to be carried into retirement are listed on the reverse side of HRSIC Form 7221.

A blank CG HRSIC-7221 is included in this appendix as Exhibit 3.

Preparation

If you elect to carry allotments forward from active duty, you may do so by using your latest LES.

- On your LES, line through th e allotments you desire to cancel upon retirement. All authorized allotments not lined through will be transferred to your retired pay account. Please see Exhibit 4 for an example of how to annotate the LES.

If you elect to start new allotments, you must complete a CG HRSIC-7221.

- The Department of Treasury requires that all savings allotments be sent by direct deposit. Therefore, in order to start a new savings allotment, you need to either: submit a FMS Form 2231; or provide a signed letter request including your account number, the name of the financial institution and a voided check or pre-printed deposit slip; or provide the information in the EFT section of the CG HRSIC-7221.
- If you desire to change or stop any allotment after you are retired, simply notify HRSIC by letter or use the CG HRSIC-7221.
- Your active duty allotments will be paid through the month of your retirement and deducted from your separation pay. In the event the amount of allotments paid from your active duty pay exceeds available entitlements, then the overpayment will be collected from your retired pay account. This normally would happen only if your retirement date is other than the first of the month.
- Be sure to sign and date the form on the reverse.

Overview

Introduction

This appendix will guide you through the procedures needed to complete a DD-1172.

Forthcoming change to Appendix B, DOD Instruction 1000.13

Appendix B is a Department of Defense Instruction 1000.13 which disseminates responsibilities and procedures for the issuance of ID cards and privileges to members of the Uniformed Services of the United States and their dependents. A new forthcoming change to this instruction (Appendix B) includes Wards as eligible dependents. Until an updated version of Appendix B is published, Coast Guard units and ID cards issuing facilities should use the following guidance to establish a Ward as a dependent.

Eligibility of Wards for treatment in Military Medical Facilities and CHAMPUS Benefits

The definition of a dependent for the purpose of allowances as noted in the Coast Guard Pay Manual was expanded to include a Ward. In addition to being considered dependents for allowance purpose. Wards are now eligible for treatment in Military Medical Facilities, as well as CHAMPUS benefits. A Ward is an unmarried person who is placed in the legal custody of a member as a result of an order of a court of competent jurisdiction in the United States (or territory or possession of the United States) for a period of at least 12 consecutive months, and either:

- Has not attained the age of 21, or
- Has not attained the age of 23 and meets the criteria for a student set forth in section 3-D-4.b(6) of the Coast Guard Pay Manual, or
- Is incapable of self support because of a mental or physical incapacity that occurred while the person was considered a dependent of the member, and
- Is dependent upon the member for over one-half of the person's support, and
- Resides with the member unless separated by either the necessity of military service or to receive institutional care as a result of disability or incapacitation.

DEERS Eligibility

Coast Guard ID Card issuing facilities are authorized to verify and issue ID cards to eligible Wards, or to enter Wards in DEERS using standard procedures. The sponsor must submit the court order, birth certificate, and support statement (CG HRSIC-2020A) with the ID Card application. The court order establishing Ward status must state:

- The custodial status period will last 12 months, or
- Custody is ordered until the Ward attains a certain age and the age specified is at least 12 months in the future, or
- Custodianship is permanent and will remain in effect until ended or modified by another court of competent jurisdiction.

Eligibility Date

The eligibility start date for a Ward of an active duty member is 5 October 1994, or the date of the court order, whichever is later.

Overview

Introduction

This appendix will guide you through the procedures needed to compute service.

In this appendix

Introduction to Computation Procedures

Introduction

In this section you will learn the procedures to compute the following:

- Creditable Service
- Deductible Time
- Pay Base Date
- Active Duty Base Date
- Date of Rank
- Expiration of Enlistment
- Creditable Sea Duty

Procedure Tables

There are procedure tables on each of the above throughout this section. Use the appropriate table on every computation.

Creditable Service

Introduction

In this section we will deal with the rules and procedures for computing creditable service.

Rules

Before you learn the procedures for computing creditable service, you need to know the following:

- In computing creditable service, consider all months to have 30 days. Like pay, creditable service is on a **30 day month basis** with two exceptions:
  - 1. Active duty for training and/or other active duty for periods of less than 30 consecutive days is always computed day-for-day, and the 31st day of the month is counted.
  - 2. In deductible time computations, the 31st day of the month is counted when deductible time commences on the 31st day of the month.
- **Never** change the **beginning dates** when doing computations.
- When your ending date is the **last day** of the month and **other** than the **30th**, (as in the 31st or 28th/29th Feb) **change** it to the **30th**, except for computation of Expiration of Enlistment (see page 26).
- When subtracting one date from another date, always **ADD** 1 day for inclusive dates. This puts the beginning date back into the computation.
- When subtracting time from a date, **DO NOT** add a day.

Inclusive Dates

An **inclusive date** is a date that needs to be accounted for in your computation. Inclusive meaning "to include" is a term used for date that form the boundaries of the days that you need to account for. For example if you departed on leave the 4th of April and returned on the 11th of April, you "**inclusive dates**" of leave would be 5 to 10 April. The 5th to 10th of April make up the boundaries of the days you were on leave. So when you determine the "**beginning date**" and "**ending date**" you are establishing the inclusive dates.

Continued on next page

Date of Rank

Introduction

Date of Rank is the actual or constructive date of advancement. The date of rank is for advancement purposes within the present rating and is based on a 30 day month.

Date of Rank

Use the following steps in computing a new Date of Rank for members on active duty:

Step	Procedure
1	List the date of latest advancement or most current date of rank or list the date of latest enlistment.
2	The following rules apply: • Subtract periods of creditable Coast Guard (USCG) or Coast guard Reserve (USCGR) active duty. • Only time previously served in the present or higher pay grade in the USCG or USCGR, under continuous active service conditions within three months of separation is creditable. • Members with broken service (out of service over three months) will have their Date of Rank based on the effective date of their reenlistment. • When calculating prior active service, each month will be considered to have 30 days, unless the active duty was for a period of less than 30 consecutive days. • Members who return to active duty from the CNC program will receive full credit for any TIR formerly creditable prior to their separation under the CNC program. However, to be eligible to participate in SWE competition, they must serve half the minimum TIR required for advancement after returning to active duty.
3	Add deductible time for Pay.
4	If the result is not a true date, convert to a true date using the 30 Day Rule or Date Chart.

Date of Rank, Continued

Example #1
Initial Enlistment

Member enlisted in the USCG on 19 August 1996 as an SR. The member has no prior Coast Guard or Coast Guard reserve service.

- Step 1 - Member enlists in the USCG as E1.

  96 08 19

- Step 2 - Subtract prior USCG/USCGR active service

  96 08 19 Date member enlisted in USCG as E1
  + 00 00 00 prior USCG/USCGR active service

  96 08 19

  96 08 19 New Date of Rank

Example #2
Entered USCG, RELAD, reenlisted USCG in same rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follows:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)

- Step 1 - Member enlists in the USCG as E4 (BM3)

  96 08 19

(Continued on next page)

Date of Rank, Continued

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

	96 07 01	Date of initial expiration of enlistment
-	94 07 01	Date member initially advanced to E4 (BM3)
	02 00 00	
	+1	
	02 00 01	

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

	96 08 19	Date member enlisted in the USCG as E4 (BM3)
-	02 00 01	Prior USCG/USCGR active service in pay grade E4 (BM3) or above
	94 08 18	

94 08 18 New Date of Rank

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follow:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)
96 01 01 E5 (BM2)

- Step 1 - Member enlists in the USCG as E4 (BM3)

96 08 19

(Continued on next page)

Date of Rank, Continued

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

	96 07 01	Date of initial expiration of enlistment
-	94 07 01	Date member initially advanced to E4 (BM3)
	02 00 00	
	+1	
	02 00 01	

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

	96 08 19	Date member enlisted in the USCG as E4 (BM3)
-	02 00 01	Prior USCG/USCGR active service in pay grade E4 (BM3) or above
	94 08 18	
	94 08 18	New Date of Rank

Example #4 Discharged from USCGR, entered USCG in same pay grade

Member was discharged from the USCGR on 27 January 1997 as an E3 and enlisted in the USCG on 28 January 1997 as an E3. The member had prior USCGR service from 6 June 1995 to 27 January 1997. Member has the following pay grade history in the USCGR.

95 06 06 E1
95 07 28 E2
96 11 16 E3

- Step 1 - Member enlists in the USCG as an E3.

97 01 28

(Continued on next page)

Date of Rank, Continued

Example #4 Discharged from USCGR and entered USCG in same pay grade, continued

- Step 2 - Subtract prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3)

97 01 28 Date member enlisted in the USCG as an E3
\- 00 00 00 Prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3). **Member was not on AD during this time frame.**

97 01 28

97 01 28 New Date of Rank

Example #5 Discharged from USCGR and entered USCG in lower pay grade

Member enlisted in the USCG on 3 November 1996 as an SA. The member had prior USCGR service from 5 July 1995 to 2 November 1996 and was on active duty for the following periods:

95SEP07 - 95DEC23
96JUL29 - 96AUG11

Member has the following pay grade history in the USCGR:

95 06 05 E1
95 12 23 E2
96 07 01 E3

Step 1 - Member enlists in the USCG as an E2.

96 11 03

Step 2- Member's prior active service in pay grade E2 or above.
(1) 1 day of ADT on 95 12 23
(2) 14 days of ADT 96 07 29 through 96 08 11 (day for day, since less than 30 days active)

15 days total

(Continued on next page)

Date of Rank, Continued

Example #5 Discharged from USCGR and entered USCG in lower pay grade, continued

- Step 3- Subtract prior USCG/USCGR active service in pay grade E2 or above.

96 11 03 Date member enlisted in the USCG as an E2
\- 00 00 15 Prior USCG/USCGR active service in pay grade E2 or above
(1) 1 day of ADT on 95 12 23
(2) 14 days of ADT 96 07 29 through 96 08 11

15 days total

96 10 18

96 10 18 New Date of Rank

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service)

Member enlisted in the USCG on 3 January 1997 as a BM3. The member had prior USCG service from 14 November 1993 to 31 October 1996. Member's pay grade history was as follows:

93 11 14 E1
94 01 30 E2
94 03 01 E3
95 01 01 E4 (BM3)
95 02 01 E3
95 08 01 E4 (BM3)

- Step 1 - member enlists in the USCG as an E4 (BM3).

97 01 03

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

96 10 30 Date of initial expiration of enlistment (for computation purposes 30 October 1996 will be used vice 31 October 1996)
\- 95 08 01 Date member re-attained the rank of E4 (BM3)
01 02 29
+1
01 02 30 therefore 01 03 00

(Continued on next page)

Date of Rank, Continued

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service), continued

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (during period 1 August 1995 to 31 October 1996).

  97 01 03 Date member enlisted in the USCG as E4 (BM3)
  \- 01 03 00 Prior USCG/USCGR active service in pay grade E4 (BM3) or above (during period 1 August 1995 to 31 October 1996)

  95 10 03

  95 10 03 New Date of Rank

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade

Member reenlisted in the USCG on 8 August 1996 as a YN3. The member had prior USCG service from 9 May 1988 to 3 July 1995.

Member has the following pay grade history in the USCG:

88 05 09 E1
88 07 15 E2
89 01 17 E3
91 06 01 E4 (RM3)
92 09 25 E4 (YN3)

- Step 1 - Member enlists in the U SCG as an E4 (YN3).

  96 08 08

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

  95 07 03 Date of initial expiration of enlistment
  \- 92 09 25 Date member re-attained the rank of E4 (YN3)
  02 09 08
  +1
  02 09 09

(Continued on next page)

Date of Rank, Continued

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade, continued

- Step3 - Subtract prior USCG /USCGR active service in pay grade E4 or above (same rating during period 25 September 1992 to 3 July 1995)

96 08 08 Date member enlisted in the USCG as E4 (YN3)
- 02 09 09 Prior USCG/USCGR active service in pay grade E4 or above (same rating during period 25 September 1992 to 3 July 1995)

93 10 29

93 10 29 New Date of Rank

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer

Member resumed enlisted status in the USCG on 1 June 1996 as a BM1.

Member has the following pay grade history in the USCG:

82 06 14 E1
82 08 20 E2
83 11 16 E3
84 06 09 E4 (BM3)
85 10 01 E5 (BM2)
92 07 01 E6 (BM1)
93 10 19 E6 (OCUI1)
94 03 04 O1E
95 09 04 O2E

- Step 1 - Member resumes enlisted status in the USCG as an E6 (BM1).

96 06 01

- Step2 - Prior USCG/USCGR active service in pay grade E 6 or above

94 03 03 Date of initially appointed as temporary officer
- 92 07 01 Date of member's initial attainment of E6
01 08 02
+1
01 08 03

(Continued on next page)

Date of Rank, Continued

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer, continued

- Step3 - Subtract prior USCG/USCGR active service in pay grade E 6

96 06 01	Date member resumed enlisted status in the USCG as E6
- 01 08 03	Prior USCG/USCGR active service in pay grade E6 or above (during period 1 July 1992 to 3 March 1994)
94 09 28	
94 09 28	New Date of Rank

Expiration of Enlistment

Introduction

Expiration of enlistment computations are on a **day for day** basis. Only active military service is creditable. This section provides examples of how to compute expiration of enlistment given the term of enlistment, extensions, and any deductible time.

Procedure Table #8 Expiration of Enlistment

Use the following steps in computing an Expiration of Enlistment.

Step	Procedure
1	Determine the date of entry into the Coast Guard.
2	Plus term of enlistment
3	Minus 01 day
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the day for day rule.
6	Plus, if applicable, term of extension
7	Minus 01 day
8	If the result is not a true date, convert to true date using the day for day rule.
9	Repeat steps 4,5,6,7 and 8, computing any reextensions and/or periods of deductible time

Days in the month

When you need to convert to a true date it is very important for you to know how many days are in a given month. Listed below are the number of day in each month.

• Jan - 31 days	• Jul - 31 days
• Feb - 28 days (29 for leap years)	• Aug - 31 days
• Mar - 31 days	• Sep - 30 days
• Apr - 30 days	• Oct - 31 days
• May - 31 days	• Nov - 30 days
• Jun - 30 days	• Dec - 31 days

Continued on next page

Expiration of Enlistment, Continued

Example Deductible Time

YN2 Crane enlisted in the Coast Guard on 25 May 1984 for 04 years. He also has 17 days for deductible time for expiration of enlistment purposes.

- Step 1 - Determine date of entry into the Coast Guard.

84 05 25 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

```
   84 05 25  Date of entry (Enlistment)
+  04 00 00  Term of Enlistment
   88 05 25
```

Step 3 - Minus 01 day

```
   88 05 25
-        01  Day
   88 05 24  Normal Expiration of Enlistment
```

- Step 4 - Plus deductible time for expiration of enlistment

```
   88 05 24
+        17  Days of deductible time
   88 05 41
```

- Step 5 - Convert to a true date using the day for day rule

```
   88 05 41       Subtract the number of days that belong to the
-        31       month in the months column (in this case May).  Add
   88 06 10       the remaining days to the next month(s).
   88 June 10   New Expiration of Enlistment
```

Note

Remember expiration of enlistment is done on a **day for day** basis. So when you need to round up the days to months to make a real date, subtract the number of days that belong to that particular month. For example: if your computation came out as 92 07 43 you would subtract 31 days from the days column (July has 31 days) and add the remainder to the next month. So 92 07 43 would convert to 92 08 12.

Continued on next page

Expiration of Enlistment, Continued

Extensions

When computing an expiration of enlistment based on an extension or reextension, always use the date the extension begins, add the period of the extension, then subtract 1 day to arrive at the new expiration date.

- For extensions, the begin date is the date following the normal date of expiration of enlistment.
- For reextensions, the begin date is the date following the expiration of enlistment as previously extended.

Example Extensions

PS2 Caldwell enlisted in the Coast Guard Reserve on 29 February 1988 for 08 years. He extended on 29 February 1996 for 4 years.

- Step 1 - Determine date of entry into Coast Guard

    88 02 29

- Step 2 - Plus term of enlistment

```
     88 02 29  Date of entry (Enlistment)
 +   08 00 00  Term of enlistment
     96 02 29
```

Step 3 - Minus 01 day

```
     96 02 29
 -         01  Day
     96 02 28  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
     96 02 29      First extension start date (day after original or adjusted
  +  04 00 00      expiration of enlistment) Plus term of extension.
     00 02 29
  -        01      Minus 01 day
      00 02 28
     2000 FEB 28   New expiration of enlistment
```

Continued on next page

Expiration of Enlistment, Continued

Example Extension continued

HS2 Hernandez enlisted in the Coast Guard on 31 October 1989 for 04 years. She extended on 31 October 1993 for 2 Years,reextended on 31 October 1995 for 8 months, and isreextending on 1 July 1996 for 4 months.

- Step 1 - Determine date of entry into coast Guard.

89 10 31	Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

89 10 31	Date of entry (Enlistment)
+ 04 00 00	Term of enlistment
93 10 31	

- Step 3 - Minus 01 day

93 10 31	
- 01	Day
93 10 30	Normal expiration of enlistment

- Step 4 - Add term of first extension and subtract 1 day

93 10 31	First extension start date (day after original or adjusted expiration of enlistment)
+ 02 00 00	Plus term of enlistment
95 10 31	
- 01	Minus 01 day
95 10 30	New expiration of enlistment

- Step 5 - Add term of first reextension and subtract 1 day.

95 10 31	First reextension start date
+ 00 08 00	Plus term of reextension
96 06 31	
- 01	Minus 01 day
96 06 30	New expiration of enlistment

- Step 6 - Ad d term of second reextension and subtract 1 day.

96 07 01	First reextension start date
+ 00 04 00	Plus term of reextension
96 11 01	
- 01	Minus 01 day
96 11 00	Convert to a real date
96 10 31	
96 Oct 31	Final expiration of enlistment date

Continued on next page

Expiration of Enlistment, Continued

Example Extensions continued

MK2 Williamson enlisted in the Coast Guard on 29 March 1988 for 04 years. He extended on 29 March 1992 for 2 years and 2 months, reextended on 29 May 1994 for 09 months, and is reextending on 1 March 1995 for 2 months.

- Step 1 - Determine date of entry into Coast Guard

  88 03 29

- Step 2 - Plus term of enlistment

88 03 29	Date of entry (Enlistment)
+ 04 00 00	Term of enlistment
92 03 29	

- Step 3 - Minus 01 day

92 03 29	
- 01	Day
92 03 28	Normal expiration of enlistment

- Step 4 - Add term of first extension and subtract 1 day

92 03 29	First extension start date (day after original or adjusted expiration of enlistment)
+ 02 02 00	Plus term of extension
94 05 29	
- 01	Minus 01 day
94 05 28	

- Step 5 - Add term of first reextension and subtract 1 day

94 05 29	First reextension start date
+ 00 09 00	Plus term of reextension
94 14 29	
- 01	Minus 01 day
94 14 28	Convert to a true date to arrive at the new
95 02 28	Expiration of enlistment

- Step 6 - Add term of second reextension and subtract 1 day

95 03 01	First reextension start date
+ 00 02 00	Plus term of reextension
95 05 01	
- 01	Minus 01 day
95 05 00	Convert to a true date
95 04 30	
95 Apr 30	Final expiration of enlistment date

Creditable Sea Duty

Introduction

Computation of creditable sea duty is similar to computation of creditable service:

- Consider all months on a 30 day basis. the 31st day of the month does not count **unless** the member serves less than 30 consecutive days.
- Calculate deductible time on a 30 day basis same as deductible time for pay purposes.
- Count TAD on a day for day basis.

Note: To compute TAD use procedure table #10 located in section E (quick reference tables).

- Creditable sea duty terminates on the 30th calendar day at 2400 after departure on TAD.
- Leave taken in conjunction with TAD is counted as creditable sea service.
- TAD to a qualifying sea pay vessel from a shore unit is creditable sea duty regardless of length of time aboard vessel.
- Time spent enroute from one vessel to another is not creditable.

Continued on next page

Creditable Sea Duty, Continued

Procedure Table #9 Creditable Sea Duty

Use the following steps to compute Creditable Sea Duty.

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. **If the ending date is the last day of the month and not the 30th, change it to the 30th.**
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for pay purposes.
5	Minus any period of TAD after 30 **calendar** days.
6	Plus prior sea time.
7	Convert the results into full years, months and days.

Continued on next page

Creditable Sea Duty, Continued

Example #1

Member stationed on CGC STEADFAST from 15 March 1989 to 31 March 1990. Member had not deductible time. While on board member departed TAD to RESTRACEN Yorktown on 2 May 1989 and returned on 5 June 1989.

- Step 1 - List the date member departed the vessel.

90 03 31 Ending Date

- Step 2 - Minus the date member reported to the vessel.

30	
90 03 31	Ending Date
89 03 15	Beginning Date
01 00 15	

- Step 3 - Plus 01 day for inclusive date.

90 03 30	Ending Date
89 03 15	Beginning Date
01 00 15	
+ 01	Inclusive Date
01 00 16	Creditable Sea Duty

- Step 4 - Minus deductible time. None in this example.

- Step 5 - Minus any period of TAD after 30 days.

89 05 31	Last day of month of departure
89 05 03	Day after departure
00 00 28	
+ 01	Inclusive Date
00 00 29	days TAD in MAY
00 00 04	days TAD in JUN
00 00 33	Total days TAD
- 30	Maximum allowed days TAD creditable for Sea duty
= 03	days lost for TAD
01 00 16	Creditable Sea Duty
- 00 00 03	Lost from TAD
01 00 13	Total Creditable Sea Duty

Continued on next page

Creditable Sea Duty, Continued

Example #1 continued

- Step 6 - Plus prior sea time: None, in this example.
- Step 7 - Convert to full years, months, and days

01 Year 00 Months 13 Days

Example #2

In this example we will compute a TAD period when leave is involved

While on board the CGC DALLAS member departed TAD to Support Center New York on 13 March 1990 and returned on 29 April 1990. Member used 5 days leave en route to TAD unit.

- Step 1 - List date following departure on TAD

  90 03 14 Day following date of departure

- Step 2 - Add days leave used en route to TAD unit (if applicable)

  90 03 14 Day following date of departure
  \+ 05 Days leave used en route to TAD unit
  90 03 19 Beginning Date

- Step 3 - Determine the last day of the month in the month member departed. (Beginning date month)

  90 03 31 Last day of month

- Step 4 - Subtract the beginning date from the last day of month

  90 03 31 Last day of month
  \- 90 03 19 Beginning Date
  00 00 12

- Step 5 - Plus 01 day for inclusive date

  00 00 12
  \+ 01 Inclusive Date
  00 00 13 Days TAD in March

Continued on next page

Creditable Sea Duty, Continued

Example #2 continued

- Step 6 - Add remaining days of TAD in the next month(s) up through prior date of return from TAD.

13	Days TAD in March
+ 28	Days TAD in April
41	Total days TAD

- Step 7 - Subtract days leave used en route from TAD unit to permanent unit (if applicable)

None in this example

- Step 8 - If total is 31 or more subtract any period of TAD over 30.

41	Total days TAD
- 30	Maximum allowed days TAD creditable for sea duty.
11	Total days to deduct from sea duty.

Quick Reference Tables

Procedure Table #1

Creditable Service

Step	Procedure
1	List the date of release from the Coast Guard or other Service. (Ending Date) **If date of release is the last day of the month and other than the 30th change to the 30th.**
2	Minus the date entered the Coast Guard or other Service. (Beginning Date) **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Plus any prior military service. (if applicable)
5	Minus deductible time for Pay purposes.

Procedure Table #2

Use the following steps in computing deductible time for Pay (30 day month basis computation).

Deductible time for Pay

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the date prior to returning to full duty status. This is the Ending Date. If the ending date is the last day of the month and not the 30th, change it to the 30th.
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Comment

Procedure table #2 is used to compute deductible time for all 30 day month based computations (creditable service, pay base date, active duty base date, date of rank, and creditable sea duty).

Continued on next page

Quick Reference Tables, Continued

Procedure Table #3

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within a single month.

Deductible time for Expiration of Enlistment (Single Month)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. **(Never change)**
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Procedure Table #4

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within multiple months.

Deductible time for Expiration of Enlistment (Multiple Months)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the last day of the month in the month the member departed. (**Don't** change to the 30th) **Example** - if departure date is 20 March the last day of the month would be 31 March.
3	Subtract the Beginning Date from the last day of the month member departed. **Example** - 31 March minus 20 March is 11 days.
4	Add 1 day for inclusive dates (omit if counting actual days on a calendar) Example - 11 days plus 1 inclusive day is 12 days
5	Add remaining days of deductible time in the next month(s). (If any) Example - if member returned on 4 April the deductible days in April would be 3. 12 days from March plus 3 days from April equals 15 days total deductible time.

Continued on next page

Quick Reference Tables, Continued

Procedure Table #5

Use the following steps in computing a pay base date.

Pay Base Date

Step	Procedure
1	List the date of current entry into the Coast Guard.
2	Subtract Prior Military Service (active & inactive)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30 Day Rule or Date Conversion Chart**

Procedure Table #6

Compute Active Duty Base Dates the same way as Pay Base Dates (except only active duty counts), as in computing months on a 30 day basis.

Active Duty Base Date

Use the following steps in computing an Active Duty Base Date:

Active Duty Base Date

Step	Procedure
1	List date member last entered on active duty.
2	Subtract the amount of previous active duty or active duty for training. (Weekend drills for reserves do not count.)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30 Day Rule or Date Conversion Chart**

Continued on next page

Quick Reference Tables, Continued

Procedure Table #7

Use the following steps in computing a new Date of Rank:

Date of Rank

Step	Procedure
1	List the date of latest advancement or most current date of rank.
2	Add deductible time for **pay.**
3	If the result is not a true date, convert to a true date using the 30 Day Rule or Date Conversion Chart.

Procedure Table #8

Use the following steps in computing an Expiration of Enlistment:

Expiration of Enlistment

Step	Procedure
1	Determine the date of entry into the Coast Guard
2	Plus term of enlistment
3	**Minus 01 day**
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the **day for day** rule
6	Plus, if applicable, term of extension
7	**Minus 01 day**
8	If the result is not a true date, convert to true date using the **day for day** rule
	Repeat steps 4,5,6,7, and 8, computing any reextensions and/or periods of deductible time

Comment

Remember, deductible time for Expiration of Enlistment is on an actual calendar basis.

Continued on next page

Quick Reference Tables, Continued

Procedure Table #9

Use the following steps to compute creditable sea duty.

Creditable Sea Duty

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. (Remember if the ending date is the last day of the month and not the 30th, change it to the 30th.)
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for **pay** purposes.
5	Minus any period of TAD after 30 calendar days.
6	Plus prior sea time.
7	Convert the results into full years, months, and days.

Remember

Creditable sea duty is computed on a 30 day month just like creditable service.

Continued on next page

Quick Reference Tables, Continued

Procedure Table #10

Use the following steps in computing Temporary Additional Duty for use IN computing creditable sea duty. TAD is computed on a **day for day** basis.

Temporary Additional Duty

Step	Procedure
1	List the date following departure on TAD. **Example** - if date of departure is 20 July, the date following departure is 21 July.
2	Add days leave used en route to TAD unit (if applicable). This is the beginning date. **Example** - the date following departure is 21 July and the member used 4 days leave en route, the beginning date would be 25 July.
3	Determine the last day of the month in the month the member departed. **(Beginning date month)** Don't change to the 30th. **Example** - if beginning date is 25 July the last day of the month would be 31 July.
4	Subtract the beginning date from the last day of the month member departed. **Example** - 31 July minus 25 July = 6 days
5	Add 1 day for inclusive date. **Example** - 31 July minus 25 July = 6 + 1 = 7 days
6	Add remaining days of TAD in the next month(s) up through prior date of return from TAD. **Example** - if prior date of return is 29 August add 29 days to the 7 days from July for a total of 36 days.
7	Subtract days leave used en route from TAD unit to permanent unit (if applicable). Example - if member used 3 days leave en route from TAD unit subtract 3 days from 36 for a total of 33 days TAD
8	If total is 30 or less do not subtract from creditable sea service: If total is 31 or more subtract any period of TAD over 30. Example - if total TAD is 33 days, subtract 3 days from members creditable sea service.

Comment

When computing **inclusive** dates of TAD the actual dates of TAD are listed. In cases such as these count the beginning date and ending date of TAD as days of TAD **(do not change).**

Continued on next page

Quick Reference Tables, Continued

Date Conversion Chart

When your final computation is not a real date, use the 30 Day Rule to convert to a true date (Except in some cases involving February). When a computation ends in double zeros, use the Date Conversion Chart.

If Your Computation is:	Your Date Will Be
96 01 00	95DEC31
960200	96JAN31
960228	96FEB28
950229	95FEB29*
960230	96MAR01
960231	96MAR01
960300	96MAR01
960400	96MAR31
960500	96APR30
960600	96MAY31
960700	96JUN30
960800	96JUL31
960900	96AUG31
961000	96SEP30
961100	96OCT31
961200	96NOV30
960000	96NOV30
960001	95DEC01

Comment

(*) If a pay base date computation ends as 29 February, leave as 29 February regardless if the year is a leap year. The year 1996 in the chart above is hypothetical. You can use this chart in any year.

Continued on next page

Quick Reference Tables, Continued

The following chart can be used to count actual days in each month.

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7	7	7	7
8	8	8	8	8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12	12	12	12
13	13	13	13	13	13	13	13	13	13	13	13
14	14	14	14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16	16	16	16
17	17	17	17	17	17	17	17	17	17	17	17
18	18	18	18	18	18	18	18	18	18	18	18
19	19	19	19	19	19	19	19	19	19	19	19
20	20	20	20	20	20	20	20	20	20	20	20
21	21	21	21	21	21	21	21	21	21	21	21
22	22	22	22	22	22	22	22	22	22	22	22
23	23	23	23	23	23	23	23	23	23	23	23
24	24	24	24	24	24	24	24	24	24	24	24
25	25	25	25	25	25	25	25	25	25	25	25
26	26	26	26	26	26	26	26	26	26	26	26
27	27	27	27	27	27	27	27	27	27	27	27
28	28	28	28	28	28	28	28	28	28	28	28
29		29	29	29	29	29	29	29	29	29	29
30		30	30	30	30	30	30	30	30	30	30
31		31		31		31	31		31		31

NOTE: You need to add the 29th to February when a leap year occurs.

Commandant
United States Coast Guard

2100 Second Street, S.W.
Washington, DC 20593-0001
Staff Symbol: G-WR-3
Phone: 202-267-0413

COMDTINST M1080.10D

COMMANDANT INSTRUCTION M1080.10D

Subj: MILITARY PERSONNEL DATA RECORDS (PDR) SYSTEM

1. PURPOSE. This Manual establishes policy and prescribes procedures for the administration of the Military Personnel Data Records (PDR) System. This System applies to Regular and Reserve Forces, officer and enlisted personnel.

2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of Headquarters units, Commandant (G-A, G-H, G-L, G-M, G-O, G-S, and G-W) and special staff offices at Headquarters shall ensure compliance with the provisions of this Manual.

3. DIRECTIVES AFFECTED. COMDTINST M1080.10C is canceled.

4. PROGRAM RESPONSIBILITY.

   a. Commandant (G-WR-3) is responsible for the Military Personnel Data Records (PDR) System which includes active and reserve records. Administration of the Headquarters PDR system is delegated to Commander, Coast Guard Personnel Command, CGPC (adm-3).

   b. PERSRUs are responsible for notifying members via the unit commanding officer of transactions which have been submitted on them. This is further explained in enclosure (2) of this manual.

5. CHANGES.

   a. Source Data Automation (SDA) II, the PERSRU data entry software, has changed the filing requirements of a number of existing documents. The following is a list of major changes as a result of SDA II:

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	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	2	2	2		2	2	1	2	1	1		1	2	2	1	1	1	1	1		1					
B		8	*20	1	12	2		10	2	2	2	4	2	10	1	1	2	175	1	2	2	1	10	1	1	1
C	2	2	2	1	2	2	2		1	1	2	1	2	1	1	1	1	1	2	1	1	1		1	1	
D	4	2	1	2	1	1	1	1	1	1			1				1		1	1		1			2	1
E	1	6																						1		
F	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1		1	1						
G																										
H																										

NON-STANDARD DISTRIBUTION:*B:c MLCLANT, MLCPAC (6 EXTRA)

(1) Within this manual is a reference to the "transaction log". The transaction log is produced as a by-product of an SDA II transaction, if selected. In those instances where a paper record is required, the transaction log is produced using the print command and selecting "transaction log".

(2) The Record of Emergency Data (CG-4113) and the BAQ Dependency Form (CG-4170) have been combined into the new BAQ/Dependency/Emergency-Data/SGLI Form (CG-4170A). The CG-4170A can only be produced from SDA II.

(3) The Court Memorandum (CG-3304) was eliminated. The transaction log for the Court Martial/NJP results transaction has taken the place of the CG-3304. This transaction log **MUST** be printed and filed in the appropriate PERSRU and HQ PDR location. Prior CG-3304s are to be retained.

(4) The Discharge and Reenlistment Contract (CG-3301C) has been replaced by the Enlistment/ Reenlistment Document, DD Form 4. Prior CG-3301Cs are to be retained.

(5) The Allotment Authorization(CG-4222) was eliminated.

(6) The Family Separation Allowance worksheet (CG-5213) was eliminated.

b. Headquarters PDR will be maintained electronically and consist of imaged based documents vice paper based.

c. All separation packages where separation was directed by Commander, CGPC; MLC(s); district(s); TRACEN Cape May, or Superintendent CGA, shall be filed in the Headquarters PDR. This includes discharges, RELADS, and retirements. The complete, original separation package shall be forwarded by the approving authority to Commander, CGPC (adm-3).

d. The complete request for advancement/promotion, restoration in rate, change in rate, or removal of designator, including all endorsements and final action will be forwarded to CGPC (adm-3) for filing in the Headquarters PDR.

e. Travel claim packages are authorized to be filed and retained at the unit level.

f. Personnel may now be authorized to hand carry their unit PDR.

g. Maintenance of PDR's for reserve personnel has been brought more in line with active duty procedures.

6. PRIVACY ACT REQUIREMENTS. All personnel using or maintaining PDRs and preparing associated documents must maintain the security and integrity of these records and documents at all times. Care must be exercised to ensure that unauthorized disclosure does not occur and that records and documents are properly disposed of. If the documents are not wanted by the member, shredding or other secure disposal methods must be used. **Disposing of documents**

in day-to-day trash is not proper disposal. Recycling shredded material is authorized and encouraged. See enclosures (6) and (7) for additional information and requirements.

7. PDR SYSTEM BACKGROUND DISCUSSION, DEFINITION, AND DESCRIPTION.

a. Background Discussion.

(1) Since its inception in March 1989, the paper-based PDR continues to change as technology permits us to place more reliance on electronic data. Electronic data provides greater flexibility in data retrieval and reduces costs associated with maintaining paper-based documents.

(2) Improved information resource management tools such as SDA II gives us opportunities to improve our current data management methods. SDA II placed more electronic data (personnel and pay) locally at servicing PERSRUs. This local data provides commanding officers of the serviced units greater access to information on their personnel, while reducing the time intensive and laborious task associated with maintaining paper-based documents and records.

b. Definition.

(1) The PDR System is the only system of military personnel records authorized for personnel documents retrievable by a personal identifier. The only exception will be the retention of travel claim documentation which must be maintained in accordance with enclosure (6) of this instruction. No other such system of military personnel records is authorized. PDRs will be maintained in accordance with enclosure (2).

(2) The data (both electronic and paper-based) held within the PDR System serves as the basis for determining Coast Guard responses to Personnel Records Review Board (PRRB) and Board for Correction of Military Records (BCMR) applications.

(3) This System of military personnel records retains only those specific documents necessary to manage the Coast Guard military workforce. A Personnel Data Record (PDR) is maintained for each member by each of the following:

(a) Headquarters, (electronic data). The Headquarters (HQ) PDR will consist of electronically scanned documents. See enclosure (3) for a listing of documents authorized for scanning. (Note: Documents received at Commander, CGPC (adm-3) which are not authorized for scanning will be destroyed, except as noted in paragraph 7.b.(3)(e)3.). PERSRUs and units should check the listing of authorized documents prior to forwarding (see enclosures (1) and (3)).

(b) Human Resources Service & Information Center(HRSIC), (electronic data).

1. The HRSIC PDR is a database of personnel and pay data elements maintained by the CG Human Resources Service & Information Center, Topeka, KS, as prescribed by HRSICINST M5230.1 (series), and other

HRSIC directives.

2. The SWE PDE (Personnel Data Extract) is personnel information (TIG, TIS, awards, courses, marks, exam board OPFAC, etc.) from the Enlisted Performance Evaluation System, PMIS/JUMPS, and CG Institute databases. This personnel information is used to determine a member's eligibility to participate in the SWE and to compute final multiple for advancement eligibility lists.

(c) PERSRU. The PERSRU PDR is designated as the primary field PDR (see enclosure (4))

(d) Member's assigned unit. Units maintaining personnel/pay and travel documents must file these in the Personnel Data Record (CG-5354) (see enclosure (5).

(e) Medical Records.

1. The Medical Personnel Data Record (MED PDR), generically referred to as the "Health Record," must be maintained as prescribed by Commandant (G-WK) in Chapter 4 of the Medical Manual, COMDTINST M6000.1 (series).

2. MED PDR shall **ONLY** be forwarded to Commander, CGPC (adm-3) upon member's final separation as indicated in enclosures (2) and (8) and Article 4-A-4, Medical Manual, COMDTINST M6000.1 (series). DO NOT give original MED PDR to member upon final separation.

3. Medical documents are not filed in the HQ PDR. They will be returned to the unit if received by Commander, CGPC (adm-3) in error.

(f) National Personnel Records Center (NPRC), St. Louis, MO. The NPRC PDR is the consolidation of all PDRs pertaining to a member. This combination occurs at Commander, CGPC (adm-3) when PDR maintenance is terminated upon final separation.

c. PDR Description.

(1) The Personnel Data Record (PDR), (CG-5354) is a four-part folder. The level at which the PDR is being maintained must be identified on the front cover of the PDR folder, e.g., the PERSRU PDR will clearly indicate "PERSRU PDR."

(2) The divisions within the HQ, PERSRU, and Unit PDRs are mandatory. Under no circumstances will any document not specified in this manual be filed in the HQ or PERSRU PDR (see the enclosures for more detailed information).

8. CORRECTIONS TO THE PDR.

a. General. Documents will be:

(1) Corrected or removed from the HQ PDR as authorized by Commandant (G-W), (G-WT), or Commander, CGPC (adm-3/epm/opm/or rpm). ORIGINAL documents received at Commander, CGPC (adm-3) that are not authorized for filing will be returned to the appropriate addressee. However, COPIES of documents not authorized for filing will be destroyed by Commander, CGPC (adm-3) or Commandant (G-WT) except as noted in paragraph 7.b(3)(e)3. above;

(2) Corrected or removed from the PERSRU PDR only when supported by adequate documentation;

(3) Corrected by Training Center, Cape May, NJ, for recruits under training for social security numbers, names, and date of birth which have been recorded incorrectly;

(4) Corrected or removed as directed by Commandant (G-W), (G-WT); Commander, CGPC (adm-3/epm/opm/or rpm); PRRB; or BCMR;

(5) Corrected or removed only as authorized by Commander, CGPC (adm-3/epm/opm/or rpm) or Commandant (G-WT) in all other cases not requiring administrative discretion;

(6) Filed in accordance with existing instructions when a document is replaced by a new document. For PDR purposes, the new document will be filed in the same manner as the old document;

(7) Processed as outlined in enclosure (6).

b. Amending documents contained in the PDR:

(1) An individual may request amendment to information in their PDR. Servicing PERSRU's will correct information within their scope when notified by a responsible party, e.g. member, command, HRSIC, HQ or CGPC, and necessary supporting documentation is provided.

(2) In cases where the local servicing PERSRU can not effect the change, the request will be forwarded to the cognizant authority for a determination. In all cases, the individual must be provided a copy of the PERSRU's request for amendment or advised that the request has been forwarded to a cognizant authority for determination.

9. RECOMMENDATIONS TO IMPROVE THE MILITARY PDR SYSTEM. Recommendations for improvements to the PDR system may be submitted to Commandant (G-WR-3) using enclosure (9). The PDR System is intended to provide a structured and yet flexible record system to meet the continuing and diverse needs of the Coast Guard. Recommendations to improve this system are encouraged.

10. FORMS AVAILABILITY.

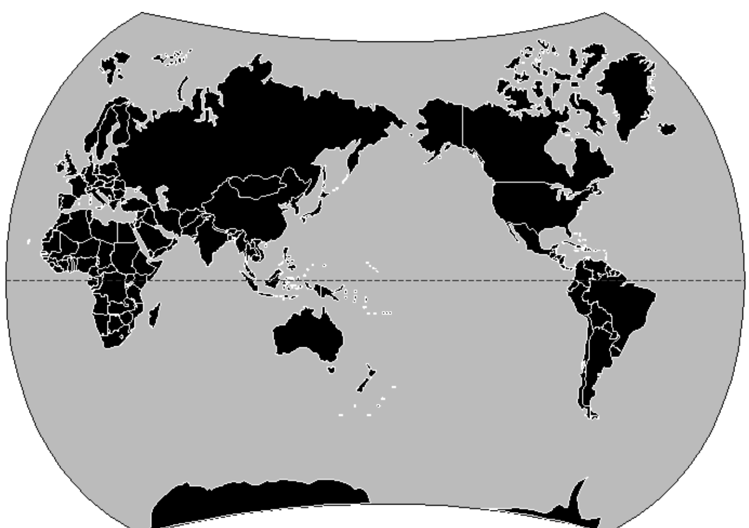
a. The Personnel Data Record (PDR), (CG-5354), is stocked at Engineering Logistics Center Baltimore. Stock number (7530-01-GF3-0590) and unit of issue EA (each)

b. The BAQ/Dependency/Emergency-Data/SGLI form can only be obtained from SDA II. It is not a form that is authorized for distribution as a blank form. It is only produced in conjunction with an SDA II transaction.

Encl: (1) Table of Document Filing Locations
(2) Personnel Record Guidelines
(3) Headquarters (HQ) PDR structure
(4) Personnel Reporting Unit (PERSRU) PDR structure
(5) Unit PDR structure
(6) Access and Disclosure of PDR documents
(7) Disclosure log
(8) Separation Documents Checklist
(9) Suggestions for Improvements to the Military Personnel Data Records Systems

Office or Division										
Initials of Responsible Officer										
Intra-office or Division Initials										
Date out										

The Traveler's Guide to Successful Claims Processing



U. S. Department of Transportation
United States Coast Guard
HRSICPUB 4600
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The Traveler's Guide to Successful Claims Processing

Contents

Overview

Introduction

The purpose of this guide is to provide Coast Guard travelers and their supervisors, who are charged with administrative review responsibilities, a concise user-friendly job aid for completing and reviewing travel claims.

For the traveler

This guide is prepared to help you (the traveler) prepare a properly completed travel claim.

- *As the traveler, **you** are the single most important person involved in the travel claim liquidation process.*

Without a properly completed claim, full reimbursement may not be possible, which means that you may not be reimbursed for part or all of the cost of your trip. We want to help you receive your full travel entitlements.

Before you begin

Before you travel, please take the time to read and understand your travel order.
Do you know:

- Where you are supposed to go?
- Why you are going there?
- How you are supposed to get there?
- When you are supposed to be there?
- How long you will be there?
- Whether or not government quarters and/or messing are available?
- What the per diem rate is for the area you are traveling to?
- Whether or not you are entitled to a rental vehicle or reimbursement for local travel while in the area?

If you can't answer "yes" to all of these questions, contact the order issuing authority or the person who prepared the order to have the order corrected or amended as necessary.

- *An incomplete or inaccurate travel order may delay processing of your travel claim and could cost **you** money!*

Note: In accordance with current GSA regulations, if you are using a government vehicle please ensure the vehicle is equipped with a valid credit card. GSA requires the traveler utilize only those stations accepting a government gas credit card.

Continued on next page

Overview, Continued

While you are traveling

We recommend that you obtain receipts for all expenses while you are traveling. You are only required to submit receipts for certain items (lodging, rental vehicles and individual expenditures of $75 or over, for example); however, you will find that the receipts you collected during your trip will be a helpful record of your expenses which you can use to complete your travel voucher. Many travelers have found it useful to maintain a DD Form 1351-2 to record both itinerary and expenses during their trip.

The Travel Claim Process and Responsibilities

Introduction

This section outlines the travel claim process and shows the responsibilities associated with each stage. If you are not familiar with the travel claim process under the new centralized Travel Liquidation and Certification (TLC) system, please take the time to review this section.

Travel Liquidation and Certification (TLC)

The Coast Guard has implemented an “On-Line” system called the Travel Liquidation and Certification (TLC) system for the liquidation of travel claims. With this system the Coast Guard can liquidate and pay travel settlements within a matter of days.

Process

This table shows the travel claim process and responsibilities.

<table>
<tr><th>Stage</th><th>Who does it</th><th>When</th><th colspan="2">What happens</th></tr>
<tr><td>1</td><td>Traveler</td><td>Within 3 days of completion of TAD or PCS travel.
(For PCS, submit claim after completion of dependents travel if dependents travel separately)</td><td colspan="2">Submits travel voucher to Supervisor for administrative review.
• Retains copy of travel voucher, orders, and receipts.</td></tr>
<tr><td>2</td><td>Supervisor</td><td>Within two days of receipt from member.</td><td colspan="2">Reviews claim for completeness.
• Dates and signs claim indicating the traveler completed the ordered travel.
• Forwards original claim to HRSIC.</td></tr>
<tr><td rowspan="4">3</td><td rowspan="4">HRSIC (TVL) Examiner</td><td rowspan="4">Normally within four days after receipt, depending on workload.
(e.g., During periods of heavy travel it may take longer for the examiner to get to your claim).</td><td colspan="2">Reviews travel voucher and enters into TLC system.</td></tr>
<tr><th>If travel voucher is</th><th>Then</th></tr>
<tr><td>Complete, correct, and accurate</td><td>Forwards reviewed claim and voucher summary to auditor.</td></tr>
<tr><td>Incorrect or incomplete</td><td>Give claim to Team Liaison who attempts to contact member/ unit/Admin Reviewer to resolve via phone clarification or faxed items. If unsuccessful, claim is returned to most appropriate individual.</td></tr>
</table>

Continued on next page

The Travel Claim Process and Responsibilities , Continued

Process (cont’d)

<table>
<tr><th>Stage</th><th>Who does it</th><th>When</th><th colspan="2">What happens</th></tr>
<tr><td>4</td><td>HRSIC (TVL) Auditor</td><td>Claim is received from examiner</td><td colspan="2">Certifies travel voucher for payment and returns to examiner for filing and mailing.
Note: A traveler whose entitlements are less than a Government travel advance will be sent a letter of overpayment at this point. See the section about advances, on page 24, for more information on the recoupment procedures.</td></tr>
<tr><td rowspan="3">5</td><td rowspan="3">Coast Guard Finance Center</td><td rowspan="3">Upon receipt from HRSIC (tvl)</td><th>If payment is</th><th>Then</th></tr>
<tr><td>Direct Deposit</td><td>Payment will be transferred to the traveler’s account within 10 days.</td></tr>
<tr><td>Check (For non-military traveler)</td><td>Check will be mailed to the address listed on the travel claim within 15 days.</td></tr>
</table>

Note: Travelers utilizing industrial site funding must contact their respective industrial site to ascertain if payment has been made.

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97)

Introduction

A properly completed travel voucher is required to process your travel claim. This section provides detailed instructions and examples for completing the travel voucher correctly.

Before you begin

These instructions apply to DD Form 1351-2, dated August 1997, Travel Voucher, for PCS and TAD travel claims.

Note: If you are submitting a claim for local travel turn to the section for completing a Local Travel Voucher on page 27 of this guide.

Make sure you have your orders, receipts, airline itinerary, etc. available before you start working on your claim. Having this information at your fingertips while working on your claim will help ensure that you remember to claim everything you are entitled to.

If we can't read it, we can't process it!
(Neatness counts)

The DD-1351-2 is available in the *Form Plus Laser*® program on Coast Guard Standard Workstation (CGSW) II or the *Jet Forms*® program on CGSW-III. Although travel claims completed *legibly* in pen are acceptable, we strongly encourage you to take advantage of the available software to complete your travel claim. Some of the blocks on the form are rather small and it can be difficult to *legibly* enter all the required information by hand. If you do not have access to a CGSW with the appropriate software, or are unfamiliar with the program(s), please contact your unit administrative office for assistance.

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions Follow these instructions to complete the travel voucher. Notes, where included, provide special rules which must be followed explicitly when claiming certain items.

<table>
<tr><th>No.</th><th>Description</th><th colspan="2">Instruction</th></tr>
<tr><td>1</td><td>Payment Required by</td><td colspan="2">Mark the block for the method of payment desired. You have two options, Check or Electronic Fund Transfer (EFT). Split Reimbursement is not in current use.

Note: If you want the direct deposit sent to an account other than your current payroll deposit account, you must complete and forward a Direct Deposit Fast Start form (SF-1199A) (available from your financial institution) or a CG HRSIC-2015, Pay Delivery Worksheet (from enclosure (1) to the Personnel and Pay Procedures Manual, HRSICINST M1000.2A) to the Coast Guard Finance Center. If using the Pay Delivery Worksheet, mark the form “For Travel Claim Payment Only”.</td></tr>
<tr><td rowspan="8">2</td><td rowspan="8">Type of Payment</td><td colspan="2">Mark the blocks which describe the type of travel and type of claim.</td></tr>
<tr><td>If you are submitting a claim for</td><td>Then check the</td></tr>
<tr><td>Temporary Duty</td><td>TDY block</td></tr>
<tr><td>Permanent Change of Station</td><td>PCS block</td></tr>
<tr><td>Yourself, and you are in the Coast Guard, Coast Guard Reserve or are a Federal Civil Service Employee employed by the Coast Guard</td><td>Member/Employee block</td></tr>
<tr><td>Yourself, and you are a member of the Coast Guard Auxiliary or a Civilian contractor</td><td>Other block</td></tr>
<tr><td>The travel of your dependents in connection with a PCS transfer</td><td>Dependent(s) block</td></tr>
<tr><td>Dislocation Allowance</td><td>DLA block.</td></tr>
<tr><td></td><td></td><td colspan="2">Note: Members without dependents, entitled to DLA, must request DLA Entitlement in the reimbursable expenses block (No. 18) and enter the following statement in the remarks block (No. 26) of the form:
“This is my ____(First)____ claim for Dislocation Allowance based on a Permanent Change of Station during __(Fiscal Year)___.”

♦ The member’s order must indicate that payment of single DLA is authorized.</td></tr>
</table>

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

No.	Description	Instruction
4	Name	Enter your name in the following format: Last, First, Middle Initial
5	Grade	**Military Personnel**: Enter your rate or rank and paygrade (e.g. YN2(E-5), CDR(O-5), etc.) **Civilian Employees:** Enter your civilian grade (e.g. GS-11, WG-3, etc.) **Auxiliarists**: Enter "AUX" **Non-Federal Civilian**: Enter "CIV"
6	SSN	Enter your social security number (9 digits). **Note**: Read the information on the reverse side of the form as required by the Privacy Act of 1974 regarding disclosure of your SSN.
7a	Address, number and street	Enter your mailing address, be sure to include apartment number or PO Box number as appropriate. **Note**: You must provide a mailing address even if you are requesting payment by EFT. If, for some reason, your direct deposit payment fails a check will be mailed to the address indicated in blocks 7a through 7d. This address will also be used to mail a copy of travel voucher summary and letter of overpayment (if applicable) to you.
7b	City	Enter the city.
7c	State	Enter the state/country (use two letter abbreviation).
7d	ZIP Code	Enter the 9 digit zip code.
8	Telephone Number	Enter the area code and telephone number where you can be contacted during the daytime. If there is a problem with your claim, the HRSIC claims examiner may try to contact you at this number for more information or to request supporting documentation, which you may be able to fax to us. Providing a "good" daytime phone number (and area code) often prevents HRSIC (tvl) from having to return a travel claim for correction.

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

<table>
<tr><th>No.</th><th>Description</th><th>Instruction</th></tr>
<tr><td>9</td><td>Travel Order Number (TONO)</td><td>Enter the Travel Order Number/Document ID Number from your travel order.

The location of the Travel Order Number or Document ID Number, as it is sometimes referred to, varies depending on what type of form or format was used for your original travel order. TONOs consist of 16 digits, the first four characters represent the type of travel and Fiscal Year.

Your TONO should be similar to one of the following:
<table>
<tr><th>Type of order</th><th>Example</th></tr>
<tr><td>TAD</td><td>1198234PBZA73000</td></tr>
<tr><td>PCS, Retirement, Discharge</td><td>1298234P23704000</td></tr>
<tr><td>Blanket or Repeat</td><td>1398234ZM1233000</td></tr>
</table>
Note: The above restrictions do not apply to Industrial site.</td></tr>
<tr><td>10</td><td>Previous Payments/ Advances</td><td>Enter the amount of any travel advances taken against the Government but not your Government-Issued Travel Charge Card. Advances taken against the Government are sometimes listed on the reverse of your order as endorsements.

If the advance was taken against your Government-Issued Travel Charge Card (ATM withdrawals, for example) it is NOT an advance against the Government and should not be listed on the travel voucher. Conversely, traveler's checks drawn against the Coast Guard are a government advance and must be listed on your travel voucher as such.</td></tr>
<tr><td>11</td><td>Organization and Station</td><td>Enter your duty station and complete address including zip code.</td></tr>
</table>

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont’d)

Note: Blocks 12 through 14 are required to be completed for PCS transfers only. TAD travelers may proceed to the instructions for block number 15 (Itinerary).

<table>
<tr><th>No.</th><th>Description</th><th colspan="3">Instruction</th></tr>
<tr><td rowspan="4">12</td><td rowspan="4">Dependent(s)
Note: If your dependents are traveling at a different time then you refrain from filing your claim until both travel periods are complete. Failure to comply may result in an indebtedness to the government.</td><td colspan="3">Complete for PCS transfers for members with dependents only. All others, leave blocks 12a, 12b, and 12c blank.</td></tr>
<tr><td>If your dependent(s) traveled</td><td>Then mark the</td><td>And</td></tr>
<tr><td>At the same time, from and to the same locations as you did.</td><td>Accompanied block</td><td>Complete the remainder of the travel voucher form.</td></tr>
<tr><td>At a different time or to or from different locations than you did.</td><td>Unaccompanied block</td><td>Complete the remainder of the travel voucher showing your itinerary in block 15 and complete a separate travel voucher with the dependent(s) itinerary in blocks 15a through 15g.</td></tr>
<tr><td>12a</td><td>Name</td><td colspan="3">Enter the dependent(s) name(s) in the following format:
Last, First, Middle Initial</td></tr>
<tr><td>12b</td><td>Relationship</td><td colspan="3">Enter the dependent(s) relationship to you (e.g. father(in-law), mother(in-law), son, daughter, incapacitated child, spouse, etc.)
• Do not list persons who traveled as a result of these orders, but are not listed on either your CG-4170A for BAH purposes or a DD-1172 for dependent ID card purposes. In order to be eligible for reimbursement for dependent travel, your dependent(s) must be listed on your travel order.</td></tr>
<tr><td>12c</td><td>Date of Birth or Marriage</td><td colspan="3">For children, enter the date of birth.
For a spouse, enter the date of marriage.
For others, enter the date of dependency determination (e.g. The date the dependent was approved by the Coast Guard or a DEERS official and listed on your CG-4170A or DD-1172 form).
Note: Additional dependents may be listed in remarks block (29)</td></tr>
<tr><td>13</td><td>Dependents’ Address on Receipt of Orders</td><td colspan="3">Enter the complete mailing address, including zip code, of your dependent(s) on the date you received PCS orders.</td></tr>
<tr><td>14</td><td>Have household goods been shipped?</td><td colspan="3">Indicate, by marking the “yes” or “no” block, whether or not your household goods have been shipped to the area of your new duty station or to the area where your dependent(s) will reside in your absence. If you marked the “no” block, please explain in the remarks (block 26) the reason household goods were not shipped.</td></tr>
</table>

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

<table>
<tr><th>No.</th><th>Description</th><th>Instruction</th></tr>
<tr><td>15</td><td>Itinerary</td><td>Use this section to provide an accounting of the time spent on your trip. You need to provide, dates of arrivals and departures, locations, mode(s) of travel used during the trip, reason(s) for any stops and the distance traveled between various points when traveling by privately owed conveyance (POC).

You need to include itinerary information for each portion of your trip that you want to be reimbursed for. For example, if you want to be reimbursed for travel by POC from your office to the airport, you need to show that travel began from your office, that you drove your POC to the airport, caught a flight to the area of the TAD site, and show the number of miles from your office to the airport.

Note: If you run out of room in the itinerary section, attach a DD Form 1351-2C, Travel Voucher or Subvoucher (Continuation Sheet).</td></tr>
<tr><td>15a</td><td>Date</td><td>In the top of the column enter the year you started the travel (e. g. 1997, for travel that begins in the year 20 00 or thereafter, line out the preprinted "19" and enter the last two digits of the year).

In the remaining rows, enter the month and day (e. g. 11/13 for 13 November) for each departure or arrival made during the trip.</td></tr>
<tr><td>15b</td><td>Place</td><td>Enter the location of each departure or arrival made during the trip. Include the unit name or other identifying title (home, airport, etc.), city, county and country or state.</td></tr>
<tr><td>15c</td><td>Means/Mode of Travel</td><td>Enter appropriate two letter code from this table to indicate how you traveled.
<table>
<tr><th colspan="2">First Letter</th><th colspan="2">Second Letter</th></tr>
<tr><td>Transportation Request</td><td>T</td><td>Auto</td><td>A</td></tr>
<tr><td>Government Transportation</td><td>G</td><td>Bus</td><td>B</td></tr>
<tr><td>Commercial Transportation (own expense)</td><td>C</td><td>Plane</td><td>P</td></tr>
<tr><td>Privately-Owned Conveyance</td><td>P</td><td>Rail</td><td>R</td></tr>
<tr><td></td><td></td><td>Vessel</td><td>V</td></tr>
<tr><td></td><td></td><td>Motorcycle</td><td>M</td></tr>
</table></td></tr>
<tr><td>15d</td><td>Reason for Stop</td><td>Enter appropriate two letter code from this table to indicate the reason for the stop.
<table>
<tr><th>Reason</th><th>Code</th></tr>
<tr><td>Awaiting Transportation</td><td>AT</td></tr>
<tr><td>Leave En Route</td><td>LV</td></tr>
<tr><td>Mission Complete</td><td>MC</td></tr>
<tr><td>Authorized Delay</td><td>AD</td></tr>
<tr><td>Temporary Duty</td><td>TD</td></tr>
</table></td></tr>
</table>

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Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

No.	Description	Instruction
15e	Lodging costs	Insert total lodging costs and attach mandatory lodging receipts.
15f	POC Miles	Enter the number of miles driven by Privately Owned Conveyance (POC)during this portion of the trip. • You CANNOT be directed to use a POC for official travel. • You may use a POC if authorized. When use of a POC is at the member's request and convenience, reimbursement is limited to the cost of Government procured transportation. • If you are authorized to travel by POC as "advantageous to the Government", travel will be reimbursed on a Monetary Allowance in Lieu of Transportation (MALT) basis. Please refer to paragraph U3305 of the JFTR for more information. **Note**: Be sure to complete block 16 indicating whether or not you were the owner/operator or a passenger during POC travel.

Example Itinerary (TAD) This is an example of a properly completed itinerary portion of a **TAD** travel claim, PCS claims will be similar.

15. ITINERARY

a. DATE 19 96		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
11/13	DEP	Home, Alameda, CA	PA			
11/13	ARR	Airport Oakland, CA		AT		015
11/13	DEP		CP			
11/13	ARR	Airport Miami, FL		AT		
11/13	DEP		CA			
11/13	ARR	O'CGDSEVEN Miami, FL		TD		
11/26	DEP		CA			
11/26	ARR	Airport Oakland, CA		AT		
11/26	DEP		PA			
11/26	ARR	Home, Alameda, CA		MC		015
	DEP					
	ARR					
	DEP					
	ARR					

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

No.	Description	Instruction
16	POC Travel	If you traveled via a privately owned conveyance during any portion of your trip you must complete this block to indicate whether you were the driver (owner/operator) or passenger.
	Owner/Operator	Mark this block if you were responsible for the operating expenses.
	Passenger	Mark this block if you were a passenger.
17	Duration of TDY Travel	Entitlements are based upon duration of TDY; consequently, you must select a block in order to receive your proper entitlement.
18	Reimbursable Expenses	Use this section (blocks 16a through 16c) to claim any reimbursable expenses. Note: If you run out of room in the Reimbursable Expenses section, attach a DD Form 1351-2C, Travel Voucher or Subvoucher (Continuation Sheet). • **When requesting reimbursement for lodging expenses you must attach an itemized receipt, regardless of the cost.** • **All reimbursable expenses of $75 or over must be accompanied by an original itemized receipt.** **Note**: A charge card receipt is not acceptable as proof of payment since it only shows the amount paid and not what was purchased.
18a	Date	Enter the date the expenses were incurred
18b	Nature of Expense	Enter the purpose of the expenses (e.g., Taxi, Bridge Toll, Hotel, Rental Car, etc.).
18c	Amount	Enter the amount you are claiming for reimbursement. **Reminder**: You must provide receipts for lodging and any expense of $75 or over.
18d	Allowed	Not used, leave blank.

Reimbursable Expenses Example

This is an example of a properly completed reimbursable expenses section of a travel voucher for TAD travel

18. REIMBURSABLE EXPENSES			
a. Date	**b. Nature of Expense**	**c. Amount**	**d. Allowed**
11/26/96	Hotel (receipt attached)	$312.56	
11/26/96	Rental Car	$259.00	
11/25/96	Fuel for rental car	$020.00	
11/26/96	Airport Parking, Oakland	$050.00	
11/10/96	Airline Ticket Oakland to Miami	$412.00	

Continued on next page

Detailed Instructions for the Completion of the Travel Voucher (DD form 1351-2, Aug. 97) , Continued

Instructions (cont'd)

No.	Description	Instruction
19	Government/ Deductible Meals	Travelers should record meals consumed when furnished with or without charge incident to a TDY by sources other than a Government Mess (See JFTR U4125-A3g and JTR C4554-B). Especially when Government prepaid meals are provided within a registration or seminar fee. A proportional meal rate will apply when one or more meals are provided. The messing entitlement noted on the Travel Order controls the reimbursement.
20a	Claimant Signature	**Important**: Sign your travel voucher. We cannot process your travel voucher unless you sign it.
20b	Date	Enter the date you are signing the travel voucher. **Reminder**: The travel voucher must be submitted to your supervisor within **three days** of completion of your trip.
21a	Approving Officer Signature	This section **must be completed** by the supervisor/administrative reviewer. By signing, the supervisor/administrative reviewer is certifying that the: • Travel was performed in accordance with the order as issued/amended. • All expenditures were reasonable, justified and consistent with the mission. • Travel voucher was completed in accordance with these instructions. • All necessary documentation (orders, receipts, etc.) are attached to the claim. Administrative Reviewers should turn to page 20 for more information on the administrative review policy, procedure, and their responsibilities.
21b	Date	Enter the date the administrative review was completed. **Reminder**: The administrative review must be completed within **two** days of receipt of the claim from the traveler.
22-28	Not used	Leave blank.
29	Remarks "Reverse Side"	Leave information. All uniformed members and civilian employees shall record dates on which leave was taken in connection with TDY. Note: The new Continuation sheet, DD-1351-2C holds the same information elaborated above for blocks 15, 18 and 19.

Rules for Claiming Official Phone Calls

Introduction

This section provides additional information for military personnel and civilian employees who are requesting reimbursement for official telephone calls or other communication charges.

Rules Concerning official calls for Military Personnel

Military personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business:

- Local calls may only be claimed when the calls were for official business, and you provide an itemized listing when you submit your travel voucher.
- Long distance calls are not reimbursable unless the order issuing official has completed the certification in block 20 of the travel voucher.
- Travel Orders and their subsequent amendments will authorize reimbursement for communication services as approved by the order issuing activity.

Rules concerning personal calls for Civilian Personnel

Civilian personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business:

For calls made within the Continental United States:

- Brief calls (less than 5 minutes) are allowed.
- A claim of no more than $5 may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.

Outside the Continental United States

- A claim of no more than five documented minutes may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.
- The maximum reimbursement allowed for telephone calls is $10 per day.

Accounting Data

Introduction

The most common cause for delays in processing travel claims is incorrect accounting data. This section will help you to determine whether or not the accounting data on your travel order is correct.

Document Number

The Document ID Number or Travel Order Number (TONO) consists of 16 digits. The first four digits represent the type of travel and Fiscal year. Your TONO should be similar to one of the following:

Type of order	Example
TAD	1198234**P**BZA73000
PCS, Retirement, Discharge	1298234**P**23704000
Blanket or Repeat	1398234**Z**M1233000

Note: Industrial site TONOs differ from this restriction.

Accounting String

The accounting string is used to charge the cost of travel to the appropriate unit and funding account. The string is represented by a series of alpha numeric characters. The general format of Coast Guard accounting line data is:

2/	F/	801/	136/	**30/**	0/	**AB/**	12345/	2673
Agency Code "2" for CG	Region/ District Code	Appropriation Code	Appropriation Limitation code	**Allotment Fund Control Code**	Allotment Level Indicator Code	**Program Element**	Cost Center	Object Class

Reimbursable Agreement Numbers (RAN)

Coast Guard travelers often travel TDY for other Government agencies (OGA), such as State Governments, EPA, Treasury, and other U. S. Armed Forces. When OGA offers to fund a TDY, the unit must coordinate how that TDY will be reimbursed through FINCEN. It is simple:

(1) Produce Travel orders and assign your routine TONO & Accounting String

Note: In Accounting line, change AFC 30 to read 80. Ensure TONO region corresponds to Program Element.

An example of a RAN accounting string and TONO follows:

A. ACCT String: 2/H/801/899/**80**/0/**WA**/77950/2152

B. TONO: 1198238**HWA**026000

Note: The region H appears at the eighth character of the TONO and the Program Element WA appears at the ninth and tenth character of the TONO, corresponding directly to the accounting string. AFC:30 is also changed to read 80.

Two important points of contact are:

FINCEN: 757-523-6890

HRSIC: 785-295-2251

Note: The above accounting restrictions do not apply to Industrial accounts.

Continued on next page

Accounting Data, Continued

Document Type 33 and DITY Moves

Claims for reimbursement of Document type 33 (Miscellaneous items) and for Do It Yourself (DITY) Moves should be forward to the Coast Guard Finance Center (FINCEN) for processing. These types of claims are not processed by HRSIC (tvl).

- Send Document type 33 and DITY Move claims to:

COMMANDING OFFICER (33)
U S COAST GUARD FINANCE CENTER
1430 A KRISTINA WAY
CHESAPEAKE, VA 23326-1000
ATTN: MISC. REIMB.

Submission of Travel Claims

Introduction

This section will guide you through the process of finishing up your travel voucher and submitting it to your supervisor for review.

The Travel Claim Package

The following items are required for each travel claim:

- Original and one copy of the travel voucher.
- Original and one copy of your travel orders, including any amendments or endorsements. (For **Document Type 13, Repeat Travel Orders**: order issuing activity will retain all original orders; orders must indicate in the remarks block the name, phone number and e-mail address of the office where the originals are on file. The member must be provided with "certified true copies" in sufficient numbers necessary to submit a copy with each claim.
- Original itemized receipt for lodging expenses regardless of the amount.
- Original receipts for reimbursable expenses of $75 or over. In the case of lost receipts, please make the following statement in block 29 of your travel claim:

  Lost original receipt(s). I will not make another claim against the government for this item on this TONO.

  Signature_________________

  Note: Please itemize your costs (i.e., how much spent for each item). For hotel receipts it is necessary to provide the name of the hotel, phone number, address and a point of contract at the hotel for verification.
- Authorized amount of advance.

Travel Voucher Submission

Before submitting your travel claim to your supervisor for administrative review, **make a complete copy of it and all required attachments.** Your travel voucher and attachments will not be returned to you after processing by HRSIC (Tvl), so it is important to keep a copy for your records in the event you need to submit a supplemental claim. Additionally, occasional loss of mail occurs and this will ensure copies of your receipts and orders are available if needed.

- Securely staple your travel claim package together to prevent loss of receipts or separation of package. (Please refrain from using paper clips).

At this point it is a good idea to review your travel claim to ensure you have completed it correctly and claimed everything you are entitled to. Use the "Traveler's Checklist" on page 21 of this guide to complete your review.

After completing the Traveler's Checklist, give your completed claim to your supervisor for review. Remember, you must submit your travel voucher to your supervisor within three days of completion of travel.

Congratulations! You have completed your travel voucher and now it is up to your supervisor to complete the administrative review and forward the entire package to HRSIC (Tvl) for processing.

Continued on next page

Submission of Travel Claims, Continued

Mailing Procedures

When submitting claims to HRSIC (Tvl) for processing, use the appropriate mail stop code, P. O. Box number and zip code from the table below. Using a P. O. Box based on your geographic area will eliminate mail sorting time and provide faster payment to you.

Location	Address
All CGD1, CGD5, CGD7, All CDG8 ***units in Florida***, LANTAREA and MLCLANT units	COMMANDING OFFICER (TVL-**EC**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3551** TOPEKA KS 66601-**3551** Fax (785) 295-2837 Fax (785) 295-2976
All CGD8 (***Except Florida***), CGD9, CGD11, CGD13, PACAREA, MLCPAC units, and Headquarters	COMMANDING OFFICER (TVL-**WC**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3552** TOPEKA KS 66601-**3552** Fax (785) 295-2835 Fax (785) 295-2960
All overseas and OUTCONUS units	COMMANDING OFFICER (TVL-**OS**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3553** TOPEKA KS 66601-**3553** Fax (785) 295-2836 Fax (785) 295-2959

Note: Please do not fold travel claim documents. Mail (unfolded) in large envelopes with all documents, receipts and copies **stapled** together as one package to reduce risk of lost documents. Use of these PO Boxes for other than travel related materials will cause a significant delay in processing.

Fax Process

The HRSIC fax process provides the unit with a verifiable, accurate and timely system of travel completion with the emphasis on accuracy and first time, only time delivery of payment.

Units desiring to access this service should contact their respective travel sections listed above. Further details are provided in HRSICINST 4600.1.

A quick overview of the process follows:

- Unit must designate Unit Authorizing Official (UAO) via letter to HRSIC (a minimum of two individuals are required).
- The member must submit competed package to UAO for review and forwarding (only the UAO is authorized to fax the completed package).
- UAO completes certification sheet and faxes the sheet, orders, relevant amendments and the travel claim to their respective Travel Team (see fax numbers above).

Continued on next page

Submission of Travel Claims, Continued

Fax Process continued

Some things to keep in mind....

- Normally, faxed claims are completed within 24 hours of receipt.
- Please do not fax PCS or extended TAD claims (if you are unsure whether or not a particular claim should be classified as TAD contact the relevant Travel Team listed above)
- The UAO is responsible for maintaining Original package (w/receipts) for random purposes.

Payment

If all documentation is correct, HRSIC (Tvl) will process your claim then electronically transmit the payment information to the Coast Guard Finance Center (FINCEN) for payment.

- You may expect the funds to be deposited in your selected account within ten working days.

Note: If you want the direct deposit sent to an account other than your current payroll deposit account, you must complete and forward a Direct Deposit Fast Start form (SF-1199A) (available from your financial institution) or a CG HRSIC-2015, Pay Delivery Worksheet (from Enclosure (1) to the Personnel and Pay Procedures Manual, HRSICINST M1000.2A) to the Coast Guard Finance Center. If using the Pay Delivery Worksheet, mark the form "For Travel Claim Payment Only."

- If you are eligible to receive a check for travel claim payment, you may expect a check to be mailed to the address you provided in block 7 of the travel voucher within 15 working days.

Continued on next page

Submission of Travel Claims, Continued

Non-receipt of Payment

You should allow 10 working days from the date you received your Travel Voucher Summary to the date you receive payment. If you have not received payment or notification of overpayment/claim rejection during this period, please contact:

- Coast Guard Finance Center's automated voice response toll free number 1-800-564-5504. Enter your social security number to receive information for the last five travel claims processed.

If the Finance Center has no record of your travel claim payment, you should contact HRSIC's Claim Assistance Team for assistance (Travelers using Industrial site accounting should contact their respective site). They can assist the unit/traveler in verifying that the travel claim was processed, that an amount is due the traveler, and can advise of the date the travel payment authorization was sent to the Finance Center. Their telephone numbers are:

(**785**) 295-2250
or
1-888-872-4885
(1-888-USCG-TVL)

Note: The toll free number (888) is for travelers who don't have access to an FTS line, Reservists, Auxiliarists, separated members, etc.

Please have a copy of your travel claim package or travel summary sheet available when you call.

The Claim Assistance Team will research your claim and advise you the next working day of its status and any further actions you may need to take.

Note: If you have waited more than 15 working days from the date the claim was mailed you may call the Claim Assistance Team at the above numbers to ascertain the claim's status.

Traveler's Checklist

NO.	Question	Initials
1.	Is the appropriate method of payment selected in block 1? Is the appropriate type of payment (TDY/PCS) selected in block 2? Note: Split Disbursement is not in current use.	
2.	Is your name (block 4), rank (block 5) and SSN (block 6) complete and legible?	
3.	Is there a complete mailing address listed in blocks 7a through d (including zip code - regardless of the method of payment selected)?	
4.	Is there a duty phone number listed in block 8 for daytime contact?	
5.	Is the Travel Order Number (TONO) listed in block 9 properly? (This must be 13 characters followed by '000' for a total of 16 characters) Industrial site Traveler disregard numerical restrictions.	
6.	If advances were charged to the orders (Government), are they listed in block 10? (Do not list advances charged to your AMEX card)	
7.	If this is a PCS claim, is the information requested by blocks 12a through c, 13 and 14 complete and correct?	
8.	Are the dates in the Itinerary section (block 15a) correct?	
9.	Have the correct codes for *Mode of Travel* (block 15c) and *Reason for Stop* (block 15d) been entered? See page 11 of this guide for the appropriate codes.	
10.	If POC is authorized and used: A) Is the mileage recorded in block 15f? B) Has the correct block been checked in section 16 (Owner/Operator or Passenger)?	
11.	Reimbursable Expenses (block 18): A) Has total cost of lodging been entered and an **itemized receipt** attached? B) If rental vehicle is authorized, has the total been listed and the **itemized rental contract** attached? C) Have all reimbursable expenses been listed and for those **of $75.00 or over** are they supported by receipts? If unavailable please follow the instructions on page 18 pertaining to lost receipts.	
12.	If additional travel was performed have the orders been appropriately amended?	
13.	If **proportional per diem** applies: Do the orders authorize the appropriate days? If Government messing is expected to be used do the orders **"direct"** messing?	
14.	If leave was authorized in conjunction with this travel, has the complete leave information been entered in block 29?	
15.	Do the orders authorize Communications services.	
16.	Sign & date your claim in blocks 20a and b. **KEEP COPIES OF EVERYTHING!** **Staple** the orders, amendment, endorsements, and receipts, to the travel claim **.**	
17.	Have Civilian Travelers noted whether or not their hotel accommodations complied with the Fire Safety Act.	
18.	Turn claim in to your supervisor for administrative review!	

Administrative Review

Introduction

This section provides the policy and procedures for administratively reviewing travel vouchers.

Policy

Paragraph 2500 of COMDTINST M4600.17, Coast Guard Supplement to Joint Federal Travel Regulations, requires the traveler's supervisor to conduct an administrative review of the travel claim before it is forwarded to HRSIC (Tvl) for processing.

- The purpose of the review is to ensure that the mission was completed and travel expenditures, including reimbursable expenses, were reasonable, justified and consistent with the mission.
- The administrative review must be performed within two working days of receipt. A single administrative review is required. However, local commands may implement other reviews and controls that they feel are necessary and appropriate.

Procedure

Follow the steps on the Administrative Review Checklist, which is on the next page of this guide, to complete the administrative review.

- When a supervisor questions an item or portion of the claim, it should be discussed with the member and a resolution sought. If resolution at this level is not possible, the supervisor must attach an endorsement to the travel claim describing the questioned item or portion.
- If an endorsement is to be attached, the notation "See Attached Endorsement" must also be made in block 23.
- In the absence of the immediate supervisor, the review may be performed by either the order authorizing or approving official as appropriate.
- The name, rank, and telephone number of the person completing the administrative review should be typed or printed in block 22a of the travel voucher. The reviewer must sign in block 22a and enter the date in block 22b.
- Mail reviewed claims to HRSIC (Tvl) using the appropriate mail stop code, PO Box number, and zip code, as shown on page 19 of this guide.

Continued on next page

Administrative Review Checklist

NO.	Question	Initials
1.	Is the method of payment selected in block 1? Is the type of payment (TDY/PCS) selected in block 2? Split disbursement is not in current use.	
2	Is the name (block 4), rank (block 5) and SSN (block 6) complete and legible?	
3	Is there a complete mailing address listed in blocks 7a through d (including zip code - **regardless of the method of payment selected**)?	
4	Is there a correct duty phone number listed in block 8 for daytime contact?	
5	Is the Travel Order Number (TONO) listed in block 9 properly? (This must be 13 characters followed by '000' for a total of 16 characters) Industrial travelers may disregard this verification.	
6	If advances were charged to the orders (Government), are they listed in block 10? (Make sure advances charged to the MBR's travel AMEX card are NOT listed here!)	
7	If this is a PCS claim, is the information requested by blocks 12a through c, 13 and 14 complete and correct?	
8.	Do the dates in the Itinerary section (block 15a) agree with the orders?	
9.	Have the correct codes for *Mode of Travel* (block 15c) and *Reason for Stop* (block 15d) been entered and do they agree with the orders? See page 11 of this guide for the appropriate codes.	
10.	If POC is authorized and used: A) Is the mileage recorded in block 15f? B) Has the correct block been checked in section 16 (Owner/Operator or Passenger)?	
11.	Reimbursable Expenses (block 18): A) Has total cost of lodging been entered and an **original itemized receipt** attached? B) If rental vehicle is authorized, has the total been listed and the **original itemized rental contract** attached? C) Have all reimbursable expenses been listed and for those **$75 or over**, are they supported by receipts?	
12.	If additional travel was performed. Have the orders been appropriately amended?	
13.	If **proportional per diem** applies: Do the orders authorize the appropriate days? If member was expected to use government messing did the orders "Direct" use.	
14.	If leave was authorized in conjunction with this travel, has the complete leave information been entered in block 29?	
15.	Have communication services been approved by the order issuing activity on the travel orders or in an appropriate amendment?	
16.	Have you ensured that either the orders or the civilian traveler has noted whether or not their hotel accommodations complied with the Fire Safety Act?	
17.	Print or type your name, rank, and telephone number in block 21a. Sign & date the claim in blocks 21a and b.	
18.	The claim package consists of the ORIGINAL claim and orders (+ 1 copy) and the ORIGINAL receipts (staple the package together; do not use paper clips; do not fold). Mail to HRSIC (Tvl) using appropriate mail stop code and P. O. Box number, located on page 29.	

Travel Advances

Introduction

This section outlines the responsibilities of the traveler and approving official to ensure accurate submission of requests for PCS and TAD travel advances.

Required Information

Requests for travel advances must include the following:

- Copy of the Travel Order or the Original Travel Order (Signed by the Authorizing Official and the Traveler).
- Completed Original Form SF-1038 “ Advance Card” (see instructions for completion on the following page. Ensure the form is signed by unit Approving Official and the Traveler.

Payment Information

It is imperative the information entered on Form SF-1038 be clear and correct. If you have selected payment by check, the check will be mailed to the address you provide on the form. You may request your travel advance be sent by direct deposit.

Where to mail requests

Shown on page 19.

Where to fax requests

Fax to the appropriate team fax number on page 19.

Preparation notes

Keep the following key points in mind when preparing requests for advances:

- Requests which are processed from an approved TAD or PCS worksheet need not have the travelers signature. However, requests not signed by the Approving Official **CANNOT** be processed. (Please indicate if traveler is not available for signature).
- HRSIC does not calculate the amount of the travel advance. This must be completed by the unit. Enter the amount applied for in block 9g of the SF-1038.
- Payments for Advance Pay and Allowances are not processed by HRSIC (TVL). Advance Pay and Allowances payments are made through PMIS/JUMPS. Requests should be forwarded to the servicing PERSRU for processing.
- Provide a complete mailing address on the SF-1038, even if requesting payment by direct deposit.

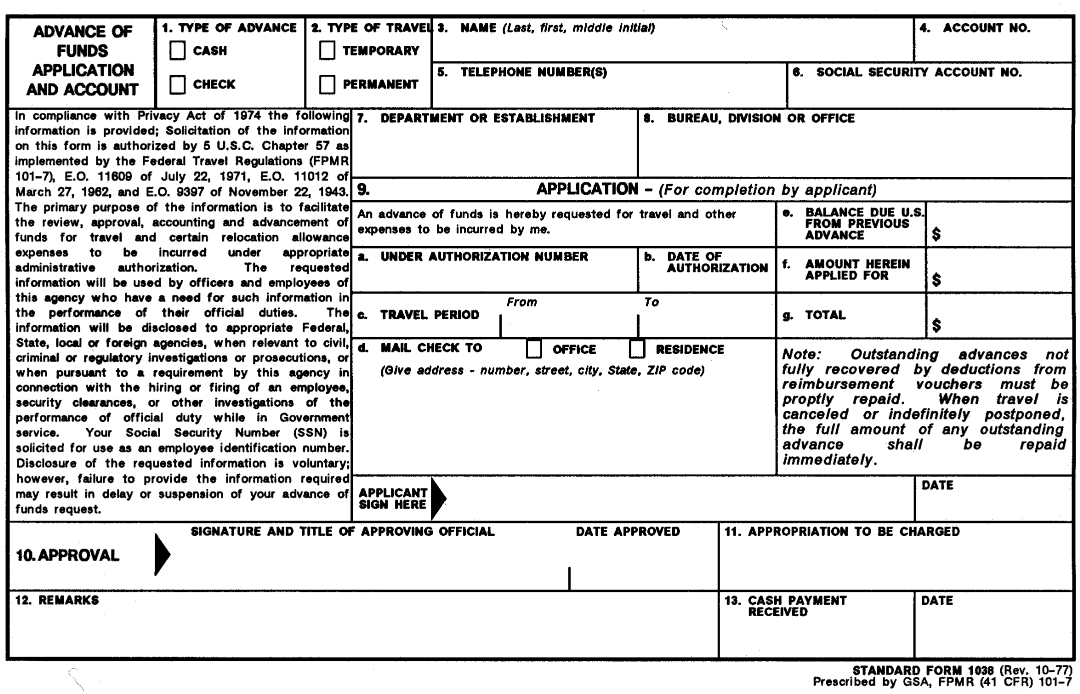
Continued on next page

Travel Advances, Continued

Completing the SF-1038

Follow these instructions to complete the Advance of Funds Application and Account (SF-1038). The SF-1038 is available in the *Form Plus Laser*® program on Coast Guard Standard Workstation (CGSW) II or the *Jet Forms*® program on CGSW-III.

Block	Entry
1	Check type of payment. Cash is not an option and if electing direct deposit type or write in "*Direct Deposit*" in this block.
2	Check type of travel being performed.
3	Member's name.
4	Leave blank.
5	Daytime telephone number including area code.
6	Member's social security number.
7	Unit name.
8	Division or staff symbol.
9a	Travel order number.
9b	Date advance is authorized.
9c	Date(s) of travel.
9d	Mailing address even if direct deposit is elected.
9e	Any previous advance issued on this travel order number.
9f	Amount applied for
9g	Total to be advanced
	Have member sign and date the form
10	Signature of approving official including the date signed.
11	Accounting data.
12	Any additional remarks.


ADVANCE OF FUNDS APPLICATION AND ACCOUNT

1. TYPE OF ADVANCE ☐ CASH ☐ CHECK
2. TYPE OF TRAVEL ☐ TEMPORARY ☐ PERMANENT
3. NAME (Last, first, middle initial)
4. ACCOUNT NO.
5. TELEPHONE NUMBER(S)
6. SOCIAL SECURITY ACCOUNT NO.

In compliance with Privacy Act of 1974 the following information is provided; Solicitation of the information on this form is authorized by 5 U.S.C. Chapter 57 as implemented by the Federal Travel Regulations (FPMR 101-7), E.O. 11609 of July 22, 1971, E.O. 11012 of March 27, 1962, and E.O. 9397 of November 22, 1943. The primary purpose of the information is to facilitate the review, approval, accounting and advancement of funds for travel and certain relocation allowance expenses to be incurred under appropriate administrative authorization. The requested information will be used by officers and employees of this agency who have a need for such information in the performance of their official duties. The information will be disclosed to appropriate Federal, State, local or foreign agencies, when relevant to civil, criminal or regulatory investigations or prosecutions, or when pursuant to a requirement by this agency in connection with the hiring or firing of an employee, security clearances, or other investigations of the performance of official duty while in Government service. Your Social Security Number (SSN) is solicited for use as an employee identification number. Disclosure of the requested information is voluntary; however, failure to provide the information required may result in delay or suspension of your advance of funds request.

7. DEPARTMENT OR ESTABLISHMENT
8. BUREAU, DIVISION OR OFFICE

9. APPLICATION - (For completion by applicant)

An advance of funds is hereby requested for travel and other expenses to be incurred by me.

a. UNDER AUTHORIZATION NUMBER
b. DATE OF AUTHORIZATION
c. TRAVEL PERIOD From To
d. MAIL CHECK TO ☐ OFFICE ☐ RESIDENCE (Give address - number, street, city, State, ZIP code)
e. BALANCE DUE U.S. FROM PREVIOUS ADVANCE $
f. AMOUNT HEREIN APPLIED FOR $
g. TOTAL $

Note: Outstanding advances not fully recovered by deductions from reimbursement vouchers must be proptly repaid. When travel is canceled or indefinitely postponed, the full amount of any outstanding advance shall be repaid immediately.

APPLICANT SIGN HERE ▶ DATE

10. APPROVAL ▶ SIGNATURE AND TITLE OF APPROVING OFFICIAL DATE APPROVED
11. APPROPRIATION TO BE CHARGED
12. REMARKS
13. CASH PAYMENT RECEIVED DATE

STANDARD FORM 1038 (Rev. 10-77)
Prescribed by GSA, FPMR (41 CFR) 101-7

Continued on next page

Travel Advances, Continued

Recoupment of unliquidated advancements	FINCEN will begin action to recoup outstanding travel advances within 30 days after the estimated date of completion of travel. Repayment of outstanding travel advances must be made in lump sum within 30 days of notification (Industrial sites initiate their own recoupment action). Repayment can be made by check or allowing deduction from your pay (Note: Civilians are assessed a $10 administrative fee for payroll deduction).
Procedure if you have not submitted travel claim	If you have not submitted a travel claim and consequently are charged for unliquidated travel advances: • Submit a travel claim with a copy of your LES showing lump sum deduction. Do not list any advances on the travel claim.

How to Complete the Local Travel Claim (SF-1164)

Introduction

The SF-1164 is used to request reimbursement for authorized local travel expenditures while on official business and for occasional meals not to exceed the proportional meal rate for the area.. All local travel claims must be submitted to your local accounting office for payment authorization. Once authorization is obtained, send the signed SF-1164 to HRSIC (TVL) for processing.

Note: When mailing local travel claims to HRSIC (TVL), use the appropriate mail stop code, PO Box number, and zip code, from page 19 of this guide.

Procedure

Follow these steps to complete the SF-1164.

Block	Enter
1	Complete unit address
4	• Your name **(including grade or rate)** • SSN • Complete mailing address (including zip code) • Work telephone number (including area code)
6	Type of expenditures (Itemized)
7	Total amount from all columns
8	Approving Official signature and date
Accounting Classification	Accounting data

All Military take note: The following statement is required when claiming reimbursement for travel that began from your home:

“I certify that the commuting distance from home to my permanent duty station (one way) by the usually traveled route is (___) miles.”

Supplemental Travel Claims

Introduction

This section provides procedures to be used when submitting a supplemental travel claim for a missed or non-claimed entitlement after the original claim has been processed.

Procedure

Follow this procedure to submit a supplemental travel claim.

Step	Action
1	Complete a travel voucher with the word "SUPPLEMENTAL" written on the top of the form. **Note**: Complete the claim exactly as the original up to block 14. Request missed or additional items in the appropriate blocks.
2	Sign and date the claim in block 21.
3	Attach the following items to the Supplemental Claim: • One copy of your travel orders. • Any endorsements or amendments to your orders. • Travel voucher summary sheet from the original claim processed by HRSIC. • Receipts for additional lodging expenses and any other expenses of $75 or over. • An explanation for missed or non-claimed items.
4	Give the supplemental claim to your supervisor for administrative review.

U. S. Coast Guard Human Resources Service and Information Center (tvl) Contact Information

Our address

Reminder
Do not fold travel claim documents. Mail in large envelopes with all documents, receipts and copies stapled together as on package.

If you are assigned to	Then use this address
All CGD1, CGD5, CGD7, CDG8 ***units in Florida***, all LANTAREA and MLCLANT units	COMMANDING OFFICER (TVL-**EC**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3551** TOPEKA KS 66601-**3551**
CGD8 (***Except Florida***), CGD9, CGD11, CGD13, PACAREA, MLCPAC units, and Headquarters	COMMANDING OFFICER (TVL-**WC**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3552** TOPEKA KS 66601-**3552**
All overseas and OUTCONUS units	COMMANDING OFFICER (TVL-**OS**) COAST GUARD HUMAN RESOURCES SERVICE & INFORMATION CENTER P O BOX **3553** TOPEKA KS 66601-**3553**

Note: These PO Boxes are for travel related items only; sending non-travel related items will cause a significant delay in processing.

Our Telephone Number

Travel Claim Assistance Team's phone number:

(**785**) 295-2250
or
1-888-872-4885 (1-888-USCG-TVL)

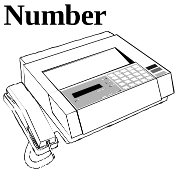
Note: The toll free number (888) is for travelers who don't have access to an FTS line, Reservists, Auxiliarists, separated members, etc.

Our E-Mail Address

Travel Claim Assistance Team's E-Mail address:

CGSWII: CSTVL/HRSIC
CGSWIII: "'CSTVL/HRSIC@MAILLANT.USCG.MIL'"

Our Fax Machine Number



Travel Claim Assistance Team's fax machine number:

785-295-2940
or
785-295-2976

YOU AND YOUR LES

(Leave and Earnings Statement)

Introduction

The LES contains a monthly accounting of your leave and earnings. This information originates from paperwork submitted by your unit's yeoman at your unit's personnel reporting unit (PERSRU), and updates the pay and personnel computer system (PMIS/JUMPS). The following is an item-by-item explanation of the more common entitlements, allotments, deductions, etc., which may appear on your LES. If you do not receive a LES on or before the end of the month payday, or if there is an error on your LES, report it to your unit's administration/personnel office immediately. It is also a good idea to let your supervisor know when you have a pay or leave accounting problem.

REMEMBER, YOU ARE RESPONSIBLE FOR ADVISING APPROPRIATE OFFICIALS OF ANY SUSPECTED ERRORS ON YOUR LES. Interest will be assessed on debts to the Government other than routine adjustments unless paid within 30 days or waived by CO, HRSIC. Failure to report known overpayments could result in administrative and/or disciplinary action being initiated against you.

Block-by-Block Description

Here is a brief description of each block on the LES. Use a copy of one of your recent LESs as an example.

Block	Title	Description
1	PERIOD COVERED	Normally a period of one month.
2	SSN	Your social security number. **Make sure this is correct.**
3	PAY BASE DATE	This is your pay base date, which is your actual or constructive date (adjusted for non-continuous service) of original entry into service on active or inactive duty. This date is extremely important. It is used to determine longevity increases in basic pay.
4	AD BASE DATE	This is your active duty base date, which is your actual or constructive date (adjusted for non-continuous service) of entry onto active duty.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
5	EXP AD TERM DATE	This is your expected active duty termination date. For regular enlisted members, this is the date you are expected to fulfill you active duty obligation. For regular officer and reserve officers on extended active duty, this is normally or mandatory-retirement date, or date of completion of contract or obligated service. For reserve officer not on extended active duty or the date you were expected to be released from your last active duty period
6	EXP LOSS DATE	This is your expected loss date. For reserve enlisted members, this is your expiration of enlistment. For regular and reserve officer, this should be your 30-year commissioned-service date. For regular enlisted member, this is your expected discharge date.
7	MID-MO	The amount paid on mid-month payday for this period.
8	END-MO	The amount paid on end-month payday for this period.
9	ACCT NR	Your savings or checking account number at the financial institution where your net pay is being deposited.
10	ROUTE NR	Your financial institution's routing number for receiving direct deposit payments.
11	BAL BF	The number of leave days to your credit at the beginning of the PERIOD COVERED. The amount of leave days will be identical to the amount in block 15 of your last month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
12	EARN	The amount of leave days you earned during the PERIOD COVERED (normally 2 ½ days per period).
13	USED	The number of leave days processed between last month's document processing cutoff date and this month's cutoff date. The actual days recorded are shown in the "Remarks" section.
14	SOLD-PD	The amount of leave sold during the PERIOD COVERED.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
15	BAL EOM	Your leave balance at the end of the PERIOD COVERED. This amount will be identical to block 11 on your next month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
16	LOS PR FY	The amount of leave in excess of 60 days that was lost at the end of the prior fiscal year (1 October).
17	SOLDCTD	The total number of days sold during your military career (after 9 February 1976).
18	USCGR TRA/PAY CAT	A three-character code indicating the reserve member's classification, class and training/pay category.
19	NAME	**MAKE SURE THIS IS CORRECT.**
20	RANK/ RATE/ GRADE	Your pay grade (e.g., W-2, E-5, O-3, etc.) **MAKE SURE THIS IS CORRECT**.
21	COST CODE	This number identifies the unit to which the member is assigned and is used for accounting purposes. Normally only HQ units have cost codes that differ from unit OPFAC's.
	PERSRU	Identifies the PERSRU that maintains the member's records.
	UNIT OPFAC	Identifies the permanent unit to which the member is assigned.
22	MAILING ADDRESS	This is your mailing address. **MAKE SURE THIS IS CORRECT.** **NOTE: This is where your IRS Form W-2 will be sent.**
23	DATE/ AMOUNT	The date and estimated amount of your next month's mid-month paycheck based on PMIS documents processed to date.
24	DATE/ AMOUNT	The date and estimated amount of your next month's end-month paycheck based on PMIS documents processed to date.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
25	ENTITLE-MEMTS	Entitlements are amounts earned during the PERIOD COVERED. Some of the most common types of entitlements are: • BASIC PAY; Amount per LES period (usually 1 month) based on your grade and years of service. This income is taxable. • BAH WITH; Basic Allowance for Housing, members with dependents: Paid to members with dependents when the dependents are not assigned/occupying Government-owned or Government-leased quarters. If Government quarters are assigned/occupied, a deduction in the same mount will be shown in block 27, itemized as "ADE QTR". • BAH WITHOUT; Basic Allowance for Housing, members without dependents: Paid to members without dependents when the member is not assigned/occupying Government-owned or Government-leased quarters or if member is married to another service member and does not qualify for BAH With. If Government quarters are assigned/occupied, a deduction in the same amount will be shown in block 27, itemized as "ADE QTR". • BAH PARTIAL; Basic Allowance for Housing, partial: Paid to members without dependents who are assigned to shipboard quarters or unit barracks. This allowance is not paid if assigned/occupying Government-leased quarters. • CLOTHING BMA and SMA; Basic Maintenance Allowance and Standard Maintenance Allowance (Clothing Allowance): Paid only to enlisted members for the purchase/ maintenance of uniform items. • ENL BAS; Basic Allowance for Subsist ence: Paid to enlisted members assigned to a unit without a Government enlisted-dining facility. Officers always receive BAS since the Government does not provide meals to officers. • SEPRATS; Separate Rations: A type of BAS paid only to enlisted members who have been given permission to mess separately even though a Government enlisted-dining facility is available, or while enroute in a travel status. • PARTIAL BAS; Partial Basic Allowance for Subsistence: A type of BAS paid only to enlisted members who are getting RIK and are eating in a messing facility. • LVRATS; Leave Rations: A type of BAS paid only to enlisted members during periods of authorized leave. This entitlement will cause a deduction of BAS/SEPRATS. • CAREER SEA PAY; Career Sea Pay: Paid to eligible members serving onboard a career sea pay eligible vessel. This income is taxable. • CAREER SEA PREM; Career Sea Pay Premium: An additional amount of sea pay paid each month beyond 36 consecutive months of sea duty. This income is taxable.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
26	ALLOT-MENTS	Allotments are monthly deductions for direct payments to payees as requested by the member. Some of the most common types of allotments are: BOND - U. S. Savings Bonds CFC - Combined Federal Campaign CGA ASSOC - CG association dues CGMA - CG Mutual Assistance DEPENDENT - support to dependents INSURANCE - insurance premium LOAN - loan payment SAVINGS - savings NAVY M-AID - Navy Mutual Aid Insurance premium HOME MORT - home loan payment VEAP - enrolled in Veteran's Education Assistance Program **NOTE:** If you have enrolled in an educational program under the GI Bill of 1984 or Montgomery GI Bill, you will see "GI BILL" or "MGIB" in this block, even though they are not allotments. They actually reduce your entitlement to base pay and taxable income by the amount contributed during that year. Enrollment in the Reserve Montgomery GI Bill will not be displayed since there is no contribution by the member.
27	DEDUC-TIONS	Deductions are administrative reductions from your gross pay in compliance with law and regulations. Some of the most common types of deductions are: * FED TAX; Federal tax withholding. The amount withheld is based on your marital status and the number of exemptions shown in block 41, which you claimed when you filed your most recent IRS Form W4. * STATE TAX; State tax withholding. Not every state requires withholding. The amount withheld is based on your marital status and the number of exemptions (or dollar amount) in block 36, which you requested when you filed your applicable state form. * FICA TAX; Federal Insurance Contribution Act withholding, also known as Social Security tax. Only basic pay is subject to this deduction, at a rate determined annually by Congress.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
27 (cont)	DEDUC-TIONS (con't)	* SGLI; Servicemembers' Group Life Insurance. The monthly premium cost of your Government life insurance coverage. * OVERPAYMENT; The deductions block will also indicate amounts with-held for repayment of overpayments or debts to the Government. **NOTE:** The "Remarks" section at the bottom of the LES will explain the situation, the amount of the original debt, the amount collected this period and the balance due.
28	AMOUNT BF	The amount brought forward (unpaid balance) from the previous month. It should be identical to the amount in block 33 of the previous month's LES.
29	ENTITLE-MENTS	The total sum of block 25 amounts.
30	ALLOT-MENTS	The total sum of block 26 amounts.
31	DEDUC-TIONS	The total sum of block 27 amounts.
32	NET EARNINGS	Block 28 plus block 29 minus blocks 30 and 31. This is your total take home pay for the PERIOD COVERED by the LES.
33	AMT TO BE CF	Any amount unpaid this period. This amount should be identical to the amount in block 28 on your next month's LES.
34	INCOME YTD	Total income subject to state tax withholding this calendar year including this period.
35	TAX W/H YTD	Total state income tax withheld this calendar year including this period.
36	EXEMPT	Your marital status and number of allowances claimed or the dollar amount of exemption claimed.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
37	LEGAL RESIDENCE	The state you claim as your legal residence for state tax purposes.
38	TAX INC THIS PD	Income subject to federal income tax withholding for this period.
39	INCOME YTD	Total income subject to federal income tax withholding this calendar year including this period.
40	TAX W/H YTD	Total federal income tax withheld this calendar year including this period.
41	ALLOW-ANCES	Your marital status and number of allowances claimed for federal income tax withholding purposes.
42	ADD'L W/H	Additional federal tax withheld for PERIOD COVERED as requested on your most recently filed IRS Form W-4.
43	FICA WAGES	Wages subject to FICA (Social Security) tax withholding for this period.
44	FICA WAGES YTD	Total wages subject to FICA (Social Security) tax this calendar year including this period.
45	FICA TX YTD	Total FICA (Social Security) tax withheld this calendar year including this period.
	REMARKS	This section frequently contains items of importance as well as additional information about your leave and earnings. It may simply call your attention to one of the amounts shown on the LES or it may address other PMIS/JUMPS issues. In any case, the remarks are important, and if you don't understand them, or any other area of your LES, you should get an explanation as soon as possible from your unit's PERSRU or administrative officer, executive petty officer, or executive officer as appropriate. Don't forget to let your supervisor know as well.

DEPARTMENT OF TRANSPORTATION
U.S. COAST GUARD
CG-4300 (REV 1-81)

U.S. COAST GUARD
LEAVE AND EARNINGS STATEMENT

MEMBER COPY

NAME/RANK: JONES, J P

1.	2. SSN	3. PAY BASE DATE	4. AD BASE DATE	5. EXP AD TERM DATE	6. EXP LOSS DATE
01-30 NOV 90	999-99-9999	84-01-23	84-01-23	94-01-22	94-01-22

YOUR NET PAY: 687.62 / 699.89

PAY SENT TO
ACCT NR: 9-999-999
ROUTING NR: 999999999
NAME: JOHN P. JONES

LEAVE INFORMATION

11. BAL BF	12. EARN	13. USED	14. SOLD FO	15. BAL END	16.	17.
19.5	2.5	3.0	0.	19.0	0.	0.

E-5
99999
09-99999-09
09-99999

123 MAIN STREET
ANYWHERE, USA 11111

NEXT MONTH'S PAY PERIOD ESTIMATES

DATE	AMOUNT
901215	699.89
910101	699.89

25. ENTITLEMENTS		26. ALLOTMENTS			27. DEDUCTIONS	
BASIC PAY	1218.30	~~VEAP~~	~~001~~	~~50.00~~	SGLI	4.00
CAREER SEA PAY	170.00	SAVINGS	004B	100.00	VHA WITH	.00
BAQ WITH	361.50	~~CGMA~~	~~001B~~	~~2.00~~	CLOTH CHECKAGE	30.00
CLOTHING BMA	19.68	~~CFC~~	~~002B~~	~~20.00~~	SINGLE DENTAL	4.57
LVRATS	17.73	BOND-M	001	50.00	FED TAX	164.62
VHA WITH	191.78				FICA TAX	93.20
					STATE TAX	73.09
TOTALS	1978.99			222.00		369.48

CONTINUE DIRECT DEPOSIT
20SEP92 John P. Jones
CONTINUE SAVINGS AND BOND ALLOTMENTS

PAY BREAKDOWN FOR THIS PERIOD

AMOUNT BF	ENTITLEMENTS	ALLOTMENTS	DEDUCTIONS	NET EARNINGS	AMT TO BE CF
.00	1978.99	222.00	369.48	1387.51	.00

STATE INCOME TAX INFORMATION

INCOME YTD	TAX WITHHELD YTD	EXEMPT	LEGAL RESIDENCE
13550.29	763.56	1-00	MA

FEDERAL TAX INFORMATION

TAX WAGES THIS PD	INCOME YTD	TAX WITHHELD YTD	ALLOWANCES	ADDL WITH	FICA WAGES	FICA WAGES YTD	FICA TAX YTD
1218.30	13550.29	1608.15	U01	.00	1218.30	13346.30	1020.99

BUY U.S. SAVINGS BONDS

REMARKS:
* THIS LES REFLECTS DOCUMENTS PROCESSED AS OF 90 NOV 17.

* PROCEDURES FOR STARTING OR CHANGING ENROLLMENT ON DIRECT DEPOSIT HAVE BEEN SIMPLIFIED. JUST PROVIDE A VOIDED CHECK OR DEPOSIT SLIP FOR YOUR CHECKING ACCOUNT TO YOUR PERSRU -- THEY'LL TAKE IT FROM THERE. IF YOU LIKE, YOU CAN STILL USE A DIRECT DEPOSIT SIGN-UP FORM (SF-1199A).

* 05.0 DAYS LV EARNED & 03.0 DAYS LV USED TO DATE IN FY91.
* SEA DUTY COMMENCED 90 OCT 25. CUMULATIVE SEA DUTY AS OF 90 NOV 10 IS 04 YEARS 09 MONTHS AND 29 DAYS.
* REGULAR LEAVE FROM 90 OCT 01 TO 90 OCT 03, 03 DAYS.
* "S" ALLOTMENT FOR $100.00 PER MONTH STARTED 90 NOV 01.
* YOU HAVE CONTRIBUTED A TOTAL OF $2,150.00 TO VEAP.
* COLLECTION OF CLOTH CKG DEBT. TOTAL AMOUNT $30.00 COLLECTED THIS MONTH $30.00. BALANCE DUE $00.00

* POSTING VERIFIED CORRECT. INITIALS ________________ DATE ______________

YOUR PAY IS YOUR RESPONSIBILITY
YOU MUST REPORT SUSPECTED ERRORS TO YOUR PERSRU

Appendix (A) - Exhibit 4 (page 1 of 1)

Subject **Page**

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